



SS&C Completes Acquisition of Hubwise Securities Limited

March 25, 2022

WINDSOR, Conn., March 25, 2022 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced it has completed its acquisition of Hubwise Holdings Limited ("Hubwise"). Hubwise is a regulated B2B investment platform serving advisers, discretionary wealth managers and self-directed digital D2C propositions.



"We are pleased to announce the completion of this strategic acquisition for SS&C," said Bill Stone, Chairman and CEO. "The partnership demonstrates our commitment to the global wealth marketplace across the full spectrum of self-serve and adviser-driven propositions."

Under the terms of the agreement, approved by Hubwise shareholders, SS&C purchased the firm in an all-cash transaction. The acquisition adds 58 employees serving 51 customers in the U.K. Angus MacDonald will continue to lead Hubwise and report to Nick Wright, Head of Global Investor and Distribution Solutions (GIDS). SS&C is the largest global transfer agency provider, servicing more than 55 million investors.

Following the acquisition, SS&C will leverage its scale and investment in digital services to target the U.K.-advised retail investment market. The addition of Hubwise enhances SS&C's capacity to help customers create highly automated and efficient multi-asset, multi-currency and multi-wrapper strategies.

"We are all excited that the change of control is complete. Now, Hubwise can focus on delivering service excellence to our customers while adding more strategic value for our customers to leverage through the broader SS&C partnership," said Angus Macdonald, Chief Executive Officer at Hubwise.

Forward-Looking Statements

Certain information contained in this press release constitute forward-looking statements for purposes of the safe harbor provisions under the Private Securities Litigation Reform Act of 1995. Forward-looking statements include statements concerning plans, objectives, goals, strategies, expectations, intentions, projections, developments, future events, performance, underlying assumptions, and other statements that are other than statements of historical facts. Such statements reflect management's best judgment based on factors currently known but are subject to risks and uncertainties, which could cause actual results to differ materially from those anticipated. Such risks and uncertainties include, but are not limited to, the state of the economy and the

financial services industry and other industries in which the Company's clients operate, and the other risks discussed in the "Risk Factors" section of the Company's most recent Annual Report on Form 10-K, which is on file with the Securities and Exchange Commission and can also be accessed on our website. Forward-looking statements speak only as of the date on which they are made and, except to the extent required by applicable securities laws, we undertake no obligation to update or revise any forward-looking statements.

About Hubwise

Hubwise Securities is a ground-breaking, innovative and regulated technology business, founded in 2012 and developed by a group of highly experienced financial services professionals.

The Hubwise service is built on four core components; Technological Innovation, Multi-asset Execution, Investment Operations and Custody & Safeguarding of Assets.

Hubwise is regulated by the Financial Conduct Authority, is a member firm of the London Stock Exchange to enable control of execution across multiple asset types, is an HMRC-approved ISA plan manager and is a member of CREST.

About SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale, and technology.

Additional information about

SS&C (Nasdaq:SSNC) is available at www.ssctech.com.

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