



SS&C Launches New ESG Reporting Solutions

September 8, 2021

WINDSOR, Conn., Sept. 8, 2021 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC) today announced the launch of its ESG reporting solutions platform for asset managers to better monitor and report on ESG exposure in their portfolios. SS&C's platform will support compliance with the EU Sustainable Finance Disclosure Regulation (SFDR) and deliver greater insights and transparency into ESG portfolio risks.



"Investors are looking for ESG transparency into portfolios," said Theodore Hagan, Chief Financial Officer, Paloma Partners. "Paloma chose SS&C's ESG Transparency Reporting solution to provide investors with independent insight into our ESG investment reporting."

"The market and regulators increasingly recognize that ESG factors can affect risk and return, and companies are facing increasing pressure to bring more transparency to this space," said Mike Megaw, Managing Director, SS&C Regulatory Services. "Our vendor-agnostic ESG solution platform ensures that managers and investors alike can easily access ESG information to make better decisions about their investments."

SS&C has partnered with Sustainalytics to create investor transparency, carbon risk and sensitive sector exposure disclosure reports. The platform scans managers' underlying data against Sustainalytics' ESG dataset based on the metrics that apply to the fund's objectives, frequency, design and format to satisfy investor and regulatory requirements.

"We see the growing manager and investor demand to incorporate ESG metrics into client reporting at the manager and portfolio level," said Tim Langer, Director of Client Relations at Sustainalytics. "SS&C's solution provides accurate and detailed ESG rating data which is a game-changer to help investors understand sustainable investing and ESG exposures."

Additionally, SS&C's ESG solutions platform helps EU financial market participants with the regulatory disclosure requirements for the Sustainable Finance Disclosure Regulation (SFDR). Clients will get access to a robust set of analytical and reporting tools that disclose ESG exposures and brings more transparency to products that promote ESG characteristics or have sustainable investment objectives.

Learn more about SS&C ESG reporting solutions [here](#).

About Sustainalytics

Sustainalytics, a Morningstar Company, is a leading ESG research, ratings and data firm that supports investors around the world with the development and implementation of responsible investment strategies. For more than 25 years, the firm has been at the forefront of developing high-quality, innovative solutions to meet the evolving needs of global investors. Today, Sustainalytics works with hundreds of the world's leading asset managers and pension funds who incorporate ESG and corporate governance information and assessments into their investment processes. Sustainalytics also works with hundreds of companies and their financial intermediaries to help them consider sustainability in policies, practices and capital projects. With 16 offices globally, Sustainalytics has more than 1,000 staff members, including more than 350 analysts with varied multidisciplinary expertise across more than 40 industry groups. For more information, visit <https://www.sustainalytics.com>

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.

About Paloma Partners

Paloma is a multi-strategy hedge fund that has a historical focus on quantitative and relative value strategies. Paloma manages approximately \$4.2 billion in assets.

Additional information about

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

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