



SS&C Announces 1H2021 SS&C Advent Product Updates

April 26, 2021

WINDSOR, Conn., April 26, 2021 /PRNewswire/ -- [SS&C Technologies Holdings, Inc.](#) (Nasdaq: SSNC), today announced releases across its full line of SS&C Advent solutions, including Advent Portfolio Exchange®, Advent Genesis®, Geneva®, Moxy® and related platforms. The April 2021 release leverages best-of-breed technology, offering clients forward-looking technology to streamline reporting, enhance efficiencies, and provide greater accounting functionality to optimize their business operations.

"The strong and collaborative partnership we have and continue to cultivate with our clients is integral to building trusted solutions and services," said Karen Geiger, Senior Vice President and Co-General Manager of SS&C Advent. "This release provides our clients with flexible and scalable solutions to simplify their workflows."

Highlights of the latest releases include:

- **Advent Portfolio Exchange®** improved asset class workflows, added new APIs, greater flexibility with composites, and further enhancements to APX NextGen to enable firms to move away from Internet Explorer.
- **Geneva®** introduced a REST API, which provides a flexible, efficient and reliable alternative to the SOAP API. Further enhancements include continuing support for the transition away from LIBOR to other risk-free rates, such as SOFR.
- **Lumis®** now allows users to wrap automated and actionable workflow steps around the exception management process. The enhancement facilitates the exception management lifecycle by integrating data management functions within task-oriented workflows. The feature allows users to identify, review, track, and act on their data issues directly from the Lumis workflow steps they've created.
- **Advent Genesis™** continues to focus on tax-efficient portfolio management and has introduced support for

generating restrictions to prevent wash sales. Additional enhancements include fixed income analytics, warnings for capital gain budget violations, and a Smart Refresh protocol that eliminates the need for manual data refreshes.

- **Moxy® and Advent Rules Manager** delivered improved system performance, easier upgrades, tighter integration to APX and Genesis, expanded third-party trading and post-trade connectivity, and an enhanced experience for trading, trading operations, and compliance users.
- **Advent® Syncova** added the ability to archive SMA and Day Trading results. Additional enhancements include the stateless calculator offered via Syncova web services, which provides the ability to pass data in the API and the what-if module to support custom functions for data lookup to feed scenario calculations.
- **Tamale RMS®** has added key updates to help save analysts and portfolio managers' time and streamline processes such as scheduled reporting for dashboards, SS&C Intralinks folder mapping and a critical technology platform update for CentOS.


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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