



HEDGEfund

Best New Hedge Fund CRM Platform: Ledgex CRM

Ledgex Systems



Ledgex Systems is transforming the way hedge funds, fund of funds, endowments & foundations (E&F), private equity and wealth advisors manage their portfolios, make investment decisions, manage investor relations and meet investor demands. The powerful Ledgex platform is an integrated technology suite that streamlines front and middle office functions of investment management firms.

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The hedge fund industry is an incredibly diverse and fast-paced place to do business. What then does the firm do to ensure that they remain on the cutting edge of new developments and to ensure that they are always best placed to meet their clients' needs? Jaime Bean explains: "Ledgex Systems continuously invests in its products and team to ensure that it's providing financial firms with premier services that will enable growth, foster relations and increase operational efficiencies. The company constantly evaluates its portfolio of services to stay ahead of the technology curve and offer the transparency, innovative technology, reliability and security that is demanded by the financial sector."

Competition

Speaking about the role of his organisation in such a competitive industry, Jaime Bean explains that, "Ledgex Systems differentiates itself from competitors by focusing on the evolving needs of its clients and the financial market as a whole." This client-centric approach is conveyed in the company's product enhancements, business objectives and day-to-day operations.

Going into more details on this point, he explains about "the launch of Ledgex CRM, a solution developed to fill a void in the market that called for a sophisticated, tailor-made Client Relationship Management tool for alternative investment managers. Ledgex CRM streamlines investor relationship management and capital activity, providing the flexibility to support unique and complex relationships across all organizations."

Infinite Potential

Concerning the future of the firm, Jaime Bean paints a positive image and says that, "The future holds infinite potential for Ledgex Systems. We are proud of the positive impact we have made thus far in the financial industry, and are excited to further augment those successes through an unfailing commitment to excellence and genuine passion for technology."

The Ledgex suite features six modules:

- Ledgex Portfolio Manager, a comprehensive portfolio management (PM) system that allows managers to easily manage complex portfolio structures and evaluate portfolios for exposure, performance and manager concentration;
- Ledgex Liquidity, an advanced liquidity modelling utility and reporting engine that, given certain conditions, generates all available options for accessing assets by processing each tranche and their respective trade characteristics with a manager's liquidity terms;
- Ledgex Research, a customizable module that combines CRM, document management and research management capabilities within a single system that removes silos and puts manager research in context with the entire PM strategy;
- Ledgex Investor Relations, a highly configurable tool designed specifically for managing communications, capital movements, meetings and client interactions in a centralized system that brings organization to the investor relationship management (IRM) process;
- Ledgex Due Diligence allows firms to more effectively manage the complete manager due diligence process by standardizing and uniformly recording the quantitative and qualitative due diligence information gathered on a manager;
- Ledgex CRM is a powerful web-based solution ideal for managing and tracking investor communications, sales opportunities, client relationships and capital movements.

For more information, visit www.ledgex.com or call +1-877-700-1921