COHESITY

Cohesity Impact Analysis for: {company name}

DATE:
REPS NAME:

DISCLAIMER

The calculations are provided as a rough approximation of current and future data management product and service cost over time. Estimations are based on customer representations and reasonable assumptions made by both parties. The results presented in this report are hypothetical and may not reflect the actual costs, savings, and cash flows over time. No warranty is made, express or implied, regarding the accuracy or completeness of the output from the ROI Tool. Cohesity and its affiliates are not responsible for the consequences of any decisions or actions taken in reliance upon or as a result of the information provided in this report, related documentations, and any presentation(s). This presentation is for information purposes only and should not be construed as an offer or contract to purchase products, provide services or actual cost, under any circumstance.

COHESITY

Global Websites

Launch financial websites and portals in record time, deliver powerful investor experiences with zero coding, avoid costly compliance breaches, and greatly reduce your total cost of ownership.

$123,456

Our vast library of apps and modules enrich your website (as well as portals and documents) and deliver automation projects faster than ever before.

Minimizing time to launch allows you to engage audiences with new messaging faster; thus maximizing revenue retention and growth, and minimizing the cost of headcount required to develop, deploy, and maintain your websites.

Cost of In-house Launch
$123,456

Revenue Growth Attributed to Better Website
$50,000

Annual Technology Cost Savings
$75,000

Annual Technical Headcount Reallocation Savings
$50,000

Enterprise-grade Features From content sharing to drag-and-drop site building, Kurtosys DXM sits on the very cutting edge of content management. App library Every Kurtosys subscription includes access to the Kurtosys Studio app library – a collection of the most relevant and engaging financial data experiences to power your next portal or website. New apps are constantly being added to the library and included in your platform license.	Low code, Lightning Delivery Kurtosys DXM includes a vast library of finance-specific content and workflow modules so you can build websites and portals with zero coding and reach your sales and marketing goals faster and at a lower cost. Configuration Over Code With Studio you don't have to spend months on development – simply choose a studio app template and configure it directly in the Studio UI, then head over to DXM or Documents to incorporate it into your project.	Based on WordPress, Purpose Built for Finance The world s most widely used, battle-tested content management platform, tailored from the ground up to meet the functional, security and compliance demands of GFIs.

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> " We wanted a provider who not only had experience in this space, but actually had the full solution of both the CMS and Fund Center.
>
> - Stewart Conway, Head of Central Marketing, BMOGAM

BMO

BMO Global Asset Management

> " Our monthly traffic doubled, which is huge... I never would have guessed that.
>
> - Anthony Ialeggio, Chief Marketing Officer, Commonfund

commonfund

Secure Communities

Create secure and personalized portals to enable sales teams, deliver critical reports to partners and share private information with clients, leading to deeper client satisfaction, brand recognition, loyalty and asset retention.

$123,456

Minimizing time to launch allows you to engage audiences with new messaging faster; thus maximizing revenue retention and growth, and minimizing the cost of headcount required to develop, deploy, and maintain your websites.

Portal Launch Cost with Current Environment $123,456	Revenue Growth From Better Portal Experience $50,000	Retained revenue from better portal experience $75,000	Annual Technology Cost Savings $50,000	Annual Technical Headcount Reallocation Savings $50,000
Security Kurtosys Communities includes cutting-edge security. Adding a site login is easy with the drag-and-drop DXM editor, leaving only setup of users to do.	**Rights-based** Communities' identity management features let you provide rights-based access to webpages and documents.	**Reporting** Automated document production allows you to always provide clients with the most recent information.	**Process Automation** Configurable distribution settings enable you to push documents to your website and partner services with a single click. The Kurtosys platform allows you to save on in-house licenses or other provider fees, along with the headcount required to run them.	

> " 70% of the website was going to be about data, so it was more pragmatic for us to consider someone who was good at handling data, and then building the wider web experience around that.
>
> - Pauline Bush, Director, Marketing, Hermes Investment Management

Federated Hermes

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> We wanted to leverage on a provider, able to understand our business within the asset management and services industry and assist us with solution and services, end to end. From hosting, to content services, to technology implementation, to data. We needed a provider to support the full stack. You are the only provider in Europe (that I know), that can provide something like that.

- Giovanni Ricciolio, Head of Digital Strategy & Implementation, Generali Investments

Document Production

Build highly agile, industry-compliant sales, marketing and client service organisations by automating your financial reports, marketing materials and sales presentations.

$123,456

Labor Savings with Kurtosys
$123,456

By 1.5 FTE Reallocation

Annual License Savings
$75,000

Annual Technical Headcount Reallocation Savings
$50,000

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Security Intuitive template builder The familiar authoring environment of Adobe InDesign and Microsoft Office for creating stunning document templates that combine your content with sophisticated data display components from Kurtosys Studio. Powerful compliance rules Automate the display of key disclaimers based on business rules, exclude data points for different types of investors, and greatly reduce human error by applying critical compliance rules.	Customizable automation workflows Use Kurtosys Documents templates as the basis for automation workflows aligned to your approval processes, and easily generate thousands of different documents based on your portfolio, fund, or product data using the Kurtosys platform to save on in-house licenses or other provider fees.	Configurable distribution Configurable distribution settings allow you to push completed documents to your website and partner services with a single click, which saving on the headcount required to support infrastructure and distribution processes.

> We've got many funds and investment experts; what we really need to do is ensure our clients can get access to them and their thoughts and views as well as the data and performance of the products in the most timely and efficient manner possible.
>
> - Ross Duncton, Managing Director, Head of Marketing & Direct, BMOGAM

BMO ⊡ ®

BMO Global Asset Management

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> If we have things that require an additional level of technical expertise, we have Kurtosys support there available all the time, who are very responsive, without worrying about a lot of competing other priorities like our own internal team had before. The whole thing is just much simpler, faster, better overall.

- Anthony Ialeggio, Chief Marketing Officer

Compliance Risk Mitigation

A single source of data for all your experiences and documents. Avoid multiple costly integrations, ensure data consistency, and centralize disparate data workflows in a fully audited environment.

$123,456

Reduce Impact From Negative PR and Fines - Projected Risk Savings
$123,456

Consistency	Customization	Review, approve, enrich, correct
Kurtosys data management leverages a single source of financial data to drive all your customer-facing outputs, lowering the risk of inconsistencies and errors.	Tailor the Kurtosys Data schema to your particular needs in minutes. Add fields, data sets and other data rules to match your exact requirements, then easily push data from your warehouse into the system using our API.	Configure automatic data validations and checks to ensure error-free data used across your sites and documents. Create review and approval processes, enrich content with localization information and connect data sources easily to Kurtosys Studio apps and widgets. Correct critical data errors in seconds and limit the impact of compliance breaches.

> In addition to an excellent technology partner, we wanted to work with a firm that had specific experience in the Finance industry. A partner that could navigate compliance, returns data, and most importantly – provide the best possible experience to advisors and investors.

- Carl Hendley, Vice President Strategic Development, Motley Fool Asset Management

> Now, with the site implemented, it s not just a website – but a website platform, with a unified data model. Before, we had to update the data of our products, across three separate sites with three separate teams, at the risk of data quality and inconsistency.

- Giovanni Ricciolio, Head of Digital Strategy & Implementation, Generali Investments

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We hoped to use a provider who were experts in our field (asset management), and all the solutions that come with it in terms of regulation and reporting.

- Flora Scott, Marketing, RWC Partners

RWC

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About Kurtosys

Kurtosys empowers financial services firms to create powerful investor experiences and lasting customer relationships through efficient automation of key sales, marketing and customer service processes.

The company provides an end-to-end digital experience platform (DXP) that enables firms to create, manage, publish and optimize all their financial data, documents, websites and content in a secure, compliant environment.

As a result, it is trusted by the world's leading investment brands to mitigate their risks and reduce their costs while providing the agility to ensure they are first to market.

Kurtosys solutions include secure websites and portals, interactive data tools and apps, automated sales presentations, marketing collateral and reporting and document libraries.

Kurtosys architecture is underpinned by robust and scalable infrastructure using the latest Cloud technologies and supported by teams that understand information design, industry regulations and compliance issues and working at scale with data.

We are an ISO 27001 certified company. We have implemented a comprehensive information security management system to protect customer services including datacentre protection, business continuity, risk assessment and incident management.

Founded in 2002, Kurtosys was funded from Silicon Valley investment and operates across three global offices, employing over 200 people. The company works with some

of the world's largest financial brands, including banks, wealth managers, mutual fund providers and alternative investments.

Contact Kurtosys
Whether you're a bank, private equity firm or an asset manager, looking to build a brand new website, client portal or product campaign, or whether you just need to improve your data visualization or get your marketing documents out faster – get in touch!

Visit www.kurtosys.com to learn more.
Visit www.kurtosys.com/contact to request a free demo.