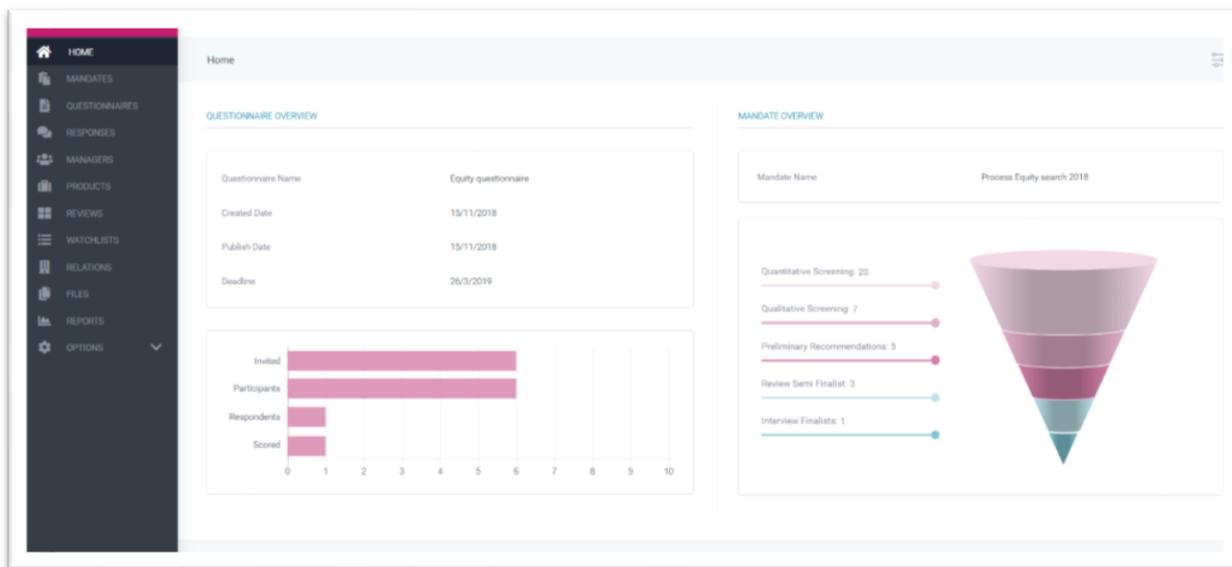# diligend

TAILORED MANAGER DUE DILIGENCE, DATA & RESEARCH MANAGEMENT SOLUTION

Diligend is a feature-rich, easy-to-use and secure web-based solution. It is cutomizable to support institutional investor and consultants with their manager research, RFP/due diligence questionnaires, and ongoing investment monitoring across all asset classes.

Who Uses Diligend?

The teams responsible for investment and operational due diligence at pension fund, consultant, family office and investment banks who are assessing hundreds of asset managers a year. The Diligend solution empowers transparency, collaboration and the management of proprietary questionnaire data, research and due diligence assessments. Whether you are investing through mutual funds, pooled funds, separate account mandates or as OCIC the Diligend solution has been designed to help efficiently document, assess and evaluate fund managers.

What Are The Key Benefits?

✓ **Smooth collection** and analysis of manager data in a standardized and flexible way

✓ Enhanced management of due diligence questionnaires through **digitization**

✓ **Centralize managers data**, research and due diligence information

✓ Easy and **flexible manager scoring** and ranking

✓ Leverage on provided **best practices** and industry-specific questionnaires

✓ Access to and communication with global managers through a **private web-based portal**

✓ Significant **time-savings** in the overall due diligence process through **automation**

✓ Improved **transparency** and traceability

Diligend Features

Research, Document Management and Emails

Centralize, classify and retrieve your research notes files and Emails. Track your phone calls and meeting minutes. Store and index documents. Drag and drop files and emails to link them to firms, strategies or specific contacts. Synchronize your Outlook. Access the contact details of registered managers and communicate directly with them through the platform. Use global search technology to retrieve any document easily and quickly.

Questionnaires Management

Digitize your investment or operational questionnaires, data requests or RFPs. Easily build or import your own customized due diligence questionnaires. Predefine your questionnaire requirements based on the asset class or investment factors important to you. Leverage on the industry best practices (AIMA, ILPA, ESG...) by using Diligend questionnaire library.

Publish and distribute your questionnaire to hundreds of managers with just a few clicks. Invite your contacts or use our registered manager database. Have a better control of the process flow and information exchange. Save time and increase transparency.

Assessment and Scoring

Access all manager responses, data, and documents in a centralized secure solution. Collect data directly in a normalized way allows for better comparison of responses. Collaborate across team to apply weighted scoring and flag areas of concern.

Review Management

Manage in a flexible way your manager reviews based on your own set of criteria for operational or investment monitoring purposes. Rate criteria, track findings, flag issues and monitor the relationship over the time.

Fund and Strategy Management

Manage your watchlist of funds/ strategies, organize them by preferred criteria, and link them to records. Monitor your own data and rating on a monthly basis. Organize your buy, hold or sell watchlist by asset class, investment strategy, geography or other criteria.

Workflow Engine

Create custom workflows specific to each stage of the due diligence process. Keep track of the selection process stage by stage. Facilitate and secure the flow of information, documents, and tasks across all internal parties. Increase the speed of due diligence process.

Collaboration and Activity Management

Communicate internally with other teams and externally with managers directly through the platform. Keep track of all interactions, and link them to related firm, strategies or mandates. Assign and track specific tasks across all team members.

Audit Trail, User Rights and Alerts

Keep track, in real time, of your team activities during the due diligence process. Manage users data access and features rights. Schedule notifications about upcoming tasks and requests related to ongoing due diligence questionnaires.

Reporting, Dashboards, Data Export, Import and API

Quickly construct a report of completed or ongoing due diligence processes, questionnaires or managers assessments. Export and analyze data in Excel or in other systems. Import data in Excel or use our API.