THE CHALLENGE

Portfolio management becomes tedious and inefficient when you are managing all of your portfolios using Excel and various disconnected systems and data sources. The lack of real-time investment and trading insight, poor data quality and lack of controls, cause a material impact to your team’s performance.

THE SOLUTION

Black Mountain integrates all of the information used by a portfolio manager into real-time dashboards and interactive reports, allowing them to manage their portfolios in one place with comprehensive, accurate, and up-to-date information.

PRODUCT FEATURES

- Provides data aggregation across multiple portfolios and asset types, enabling users to customize dashboards and reporting analytics
- Provides access to all portfolio, trading and credit information needed to manage the portfolios
- Integrates all relevant third party data, accounting data, trade data, financial models and forecasts, documents, and data formerly trapped in Excel spreadsheets
- Offers real-time integration to the Black Mountain's trading solution and/or your preferred trading solution
- Provides a library of analytic calculations such as yield, duration, and DV01, as well as other customizable analytics
- Enables users to configure custom alerts based on any data or rule so that the system can provide notifications on triggers, concerns or key events, such as watch-listed credits and securities
- Allows user to create, model, and compare portfolios and indices against each other
BLACK MOUNTAIN IS A SOFTWARE COMPANY that develops innovative, highly configurable solutions for global asset managers in the areas of data aggregation, process management, and business reporting. Our suite of best-practice solutions includes:

- Portfolio Management
- Trade Order Management
- Compliance
- Research Management
- Private Debt
- Performance Attribution
- Data Warehouse
- Enterprise Data Management (EDM)
- Investment Accounting
- Asset Servicing

Our platform eliminates the boundaries between systems, information, and people, allowing employees to focus on high-value activities that drive investment performance.

OUR CLIENTS

We work with many of the world’s leading investment managers, credit funds, hedge funds, private equity, direct lenders and banks who use our platform to manage all varieties of fixed income, alternatives, and equities including tradable loans, derivatives, real estate/mortgages, municipal finance, and FX/currencies. The list below is a representative client list.

- Alcentra
- Ally
- Antares Capital
- Apollo
- Ares
- Bain Capital Credit
- Barings
- Blackstone GSO
- Cambridge Associates
- Capital Four
- The Carlyle Group
- Eaton Vance
- Franklin Templeton
- Golub Capital
- Hamilton Lane
- Highbridge
- ICG
- Invesco
- Jefferies
- KKR
- Orchard Global
- TIAA
- TPG

ABOUT BLACK MOUNTAIN

FOUNDED
2007

CLIENTS
95+

EMPLOYEES
175+

OFFICES
San Diego
New York
London
Houston

SCHEDULE A DEMO TODAY
858-866-8989 / +44 (0) 203 540 8660
SALES@BLKMTN.COM
BLACKMOUNTAINSYSTEMS.COM