THE CHALLENGE
Relying on email and Excel to manage the compilation and distribution of internal research information, and analyst recommendations is a cumbersome process.

THE SOLUTION
Black Mountain provides an integrated Research Management solution that streamlines the collection and distribution of your firm’s research, and integrates it with your investment and trading activities.

PRODUCT FEATURES

- Manages investment pipeline, review, decision making, approval, and monitoring processes, with all relevant data and documents in a single location
- Captures, organizes, and reports analyst credit & industry commentary, underwriting analysis, investment rational and updates, related attachments, and reporting events
- Automates deal pipeline, investment approval, and monitoring reports
- Integrates with existing Excel models, financial spreadsheets, and third-party data such as ratings, pricing, security masters, and financials
- Populates watch lists and trigger alerts as financials are uploaded
- Provides a fully audited history of all information related to all deals reviewed, regardless of investment decision
- Allows for automatic identification of missing or bad data across the entire organization
- Provides configurable views and reports of quantitative & qualitative portfolio credit data and business-process flows
- Integrates with all Black Mountain solutions, as well as third party systems and data services, allowing analysts to leverage an even broader set of features and data in their daily routines
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