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eVestment and Assette Team Up to Bring Better Data Integration to Asset Management Firms

June 29, 2020, Atlanta – With most in-person meetings and events on hold, effective sales, client and digital communications have never been more important. eVestment, a global leader in institutional investment data and analytics, and Assette, a leading unified sales and client communication software provider, have teamed up to help asset managers integrate peer performance, key professional, fees and other data seamlessly into client and sales communications.

Assette delivers a cloud-based solution for the creation, review, approval, delivery and archiving of trusted sales, client and digital client communications. With easy access to eVestment quantitative and qualitative data under this agreement, asset managers will be able to create even more timely, robust and accurate materials to communicate key messages to clients and prospects.

For asset managers to effectively communicate, they need to be able to access quantitative and qualitative data from multiple sources quickly and easily. With this new agreement, a pre-built connector pulls eVestment data directly into the Assette platform. This removes the need to invest time and money building a custom interface and/or risking errors by copying and pasting data from one system to another. Now, firms can quickly add performance quartile rankings and related data directly into communication materials, in graphical and tabular formats.

"For asset management firms, high-impact and accurate reports, presentations and digital channels are more important than ever before. The days of copying and pasting data from one source to another are over," said Brian Duddy, Head of Business Development, Assette. "Our agreement with eVestment enables asset managers to interact seamlessly with trusted qualitative and quantitative data."

"eVestment's goal is to provide the best data on the institutional marketplace to investors, consultants and asset managers," said eVestment Chief Marketing Officer Michele Shauf. "Our expanded relationship with Assette supports this goal and brings great value to asset managers who want to incorporate eVestment's gold -standard data in client reports and marketing materials on their institutional strategies."

To access eVestment data through Assette, managers must be clients of both firms.

This latest effort is the second agreement between eVestment and Assette. In 2017, the companies announced an agreement to provide fully automated data input for firms subscribing to eVestment's database update solution Omni. Through this effort, eVestment Omni can use Assette to automatically generate the data files required for upload to Omni. Assette's software eliminates manually gathering data and creating the Excel spreadsheets for input to Omni.

For more information visit the Assette blog.

About Assette
Powered by the industry's only Unified Data Engine, Assette enables asset managers to automate sales, client and digital communications. Assette improves efficiency by up to 90% by integrating data and enabling faster, smoother content generation, review, and sharing. Assette clients have more than 1 trillion in assets under management and include many of the top firms in the industry. For more information, please visit www.assette.com.

About eVestment

eVestment, a Nasdaq company, provides institutional investment data, analytics and market intelligence covering public and private markets. Asset managers and general partners reach the institutional marketplace through our platform, while institutional investors and consultants rely on eVestment for manager due diligence, selection and monitoring. eVestment brings transparency and efficiency to the global institutional market, equipping managers, investors and consultants to make data-driven decisions, deploy their resources more productively and ultimately realize better outcomes.

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