psKINETIC

Product Lifecycle Management

Working with leading global asset managers, psKINETIC has developed an end-to-end framework that orchestrates the workflow for all stages of an investment product lifecycle. The solution provides clients with a rigorous product governance framework suitable for all UCITS and AIFM funds as set out by the regulatory authorities.

1. Product Ideation

- Product Design Template
  - Launch timeline
  - Ideation & feasibility analysis
  - Define product strategy
  - Identify client needs & benefits
  - Complete competitor analysis
  - Identify target market & distribution channels
  - Identify conflicts of interest
- Approval

2. Product Development

- Product Development Template
  - Stress test & risk analysis
  - Confirm client needs & benefits
  - Client testing
  - Confirm target market & distribution strategy
  - Conflicts of interest
  - Investment objectives, strategy & risk disclosures
  - Prospectus
- Listing authorisation
- Integration
- Board meeting
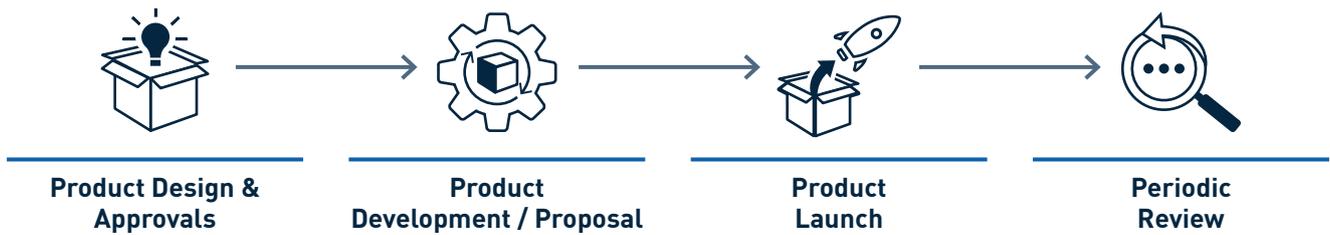- Approval

3. Product Launch

- Internal project team
- Operational setup
- Approval of legal documentation
- Develop marketing literature
- Launch

4. Review

- Ongoing lifecycle review

When launching new products, speed to market is essential to capitalise on new revenue generating opportunities and meet investor demand. The psKINETIC solution accelerates product design through to launch and removes barriers to scale. Delivering operational efficiency, agility, and process transparency, it provides a centralised command and control capability for all phases of the product lifecycle.

Product Design & Approvals	Product Development / Proposal	Product Launch	Periodic Review

- The PLM solution provides stakeholders with a single access point using intelligent automation and centralising data to create a single source of truth for product managers.
- Incorporates product design and development templates to satisfy product governance and regulatory requirements. An in-house product design template can be integrated directly into the system so that the stakeholders can complete their assigned sections in situ and print out the finished document when required.
- Project manage all phases of product lifecycle activity and assign tasks to the relevant stakeholders across functional teams and in different geographic locations. Tasks are completed and approved prior to sign-off by the investment or product governance committees.

Product Managers	Legal & Compliance	Marketing & Distribution	Operations	Investments	

- Manage tasks and against agreed timeframes through to the approvals process and detect any process bottlenecks or problems.
- Integration with different document management applications such as SharePoint allows all product related documentation to be completed and edited from within the system. All documents can be stored and updated (if changes required) from a central repository.
- A full audit trail of all comments and changes to fund related documentation is available on the system for compliance purposes.
- The system integrates with email to notify stakeholders of task assignments, overdue tasks and will automatically upload the latest version of a legal document received by a third-party supplier ready for review and comment.
- The product has unparalleled analytics capability and comprehensive management information for leadership teams.
- The framework is modular and fully customisable depending on required functionality.

We believe that return on technology comes from intelligently 'gluing' together existing systems and processes. The psKINETIC PLM solution is built from ground up to enable rapid configuration to suit your processes and integrate with your existing systems. It centralises workflow, tasks, deadlines, and stores documents and data in one intuitive user interface, ensuring the right team has access to the correct part of the process.

Efficiency and enhancement	Faster, better decisioning	Scalable	Comprehensive audit trails	Automate & digitalize	Balance risk and reward
The modules are intuitive and can be tailored to your specific needs	Design, implement and manage workflows throughout their lifecycle	Drive efficiencies throughout each stage of your PLM	Transparent and full audit history across multiple businesses and geographies	Key stage breakdown on responsible parties and timelines	Comprehensive analytics and improved insights

Creating Competitive and Commercial Value

For asset managers, the need to create and sustain a high-quality client experience is vital. That is why many are already embracing new, smart technologies and are using intelligent automation, after all, managing client portfolios is driven by data.

Reputation and trust, along with keeping on top of changing regulatory and compliance obligations is an ongoing concern, so working with the right specialist team is key.

Agile and accessible, our solutions and expert consultants can help transform your data and improve the customer experience, giving you a competitive edge.

psKINETIC – at a glance

- We **implement** and **scale** intelligent automation solutions for **ambitious** private **Capital**, **Asset** and **Wealth Managers**.
- We combine **industry expertise**, **leading automation tech** and a **proven delivery machine**.
- Driving scale, maximising returns and minimising risk by leveraging **our industry & automation technology expertise**.
- Focused on **intelligently gluing together** existing systems and processes.
- Built on trusted, highly secure, scalable technologies – we build an **agile delivery machine** - deploying into production in 90 days.

For further details contact:

DAVID LANDI - *Head of Asset Management*
Email: *David.landi@pskinetic.com*
LinkedIn: *https://www.linkedin.com/in/david-landi/*

psKINETIC

psKINETIC is a leading provider of Intelligent Automation Solutions for Financial Services. Our focus is on delivering outcomes and financial return for clients at pace. We don't believe in 'just rip out and replace' – it is too risky and too costly – with our Intelligent Glue we help clients connect and enhance existing systems and processes. Our experienced professionals master a range of automation technologies and we support customers through the full cycle of Design, Build, Run & Optimise.

For more information, visit **www.pskinetic.com**