



DEVLIN MAMBO

Empowering success;
driving innovation

Insights Data Master

EMPOWERING YOUR BUSINESS THROUGH ENHANCED DATA MANAGEMENT



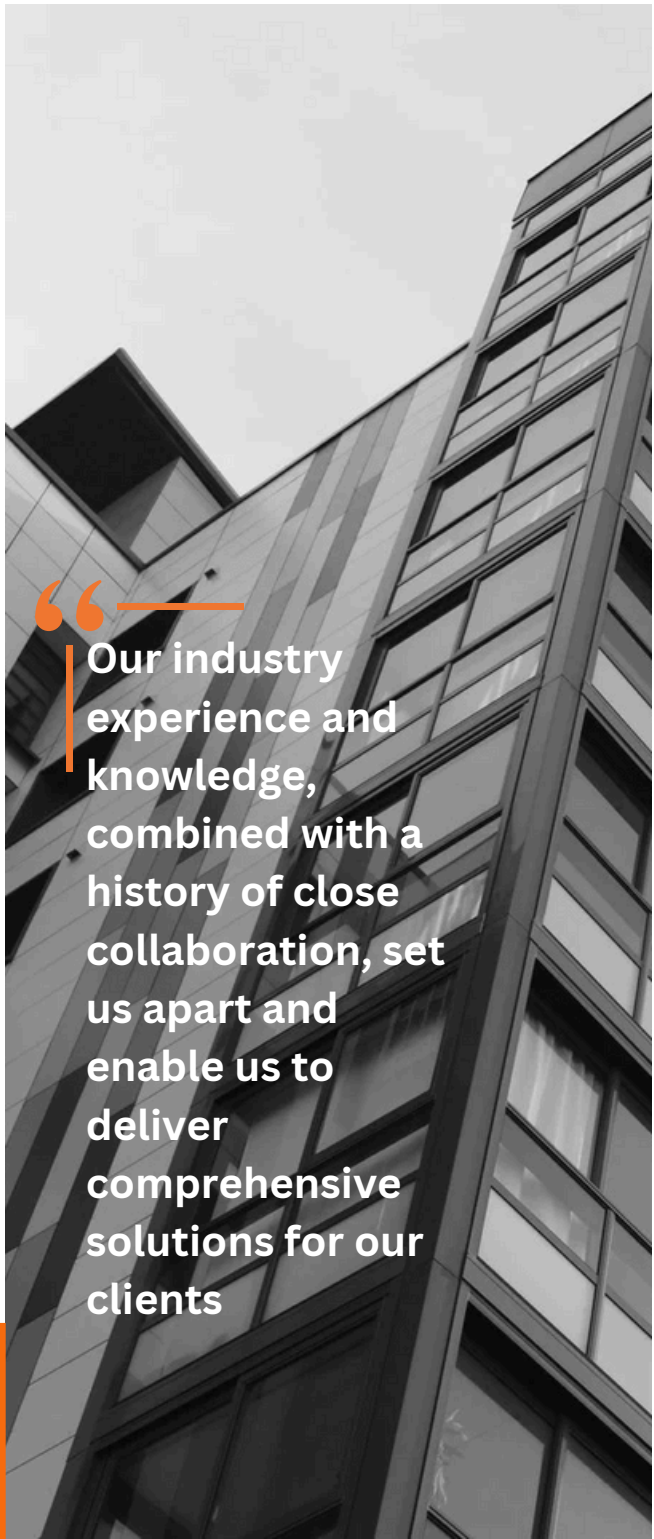
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INTRODUCTION

Poor data management practices represent a cost to businesses due to data processing inefficiencies. This can increase the risk of incorporating bad data into regulatory and client reporting and management information, hampering decision making. Furthermore, it limits the ability to **put data to work**, and reduces your ability to generate accurate and timely insights. This can result in substantial opportunity costs.

Insights Data Master (IDM) is our product mastering solution designed to provide a single source of truth (Golden Source) for all your product data. With IDM you can create, maintain and access all data from one central location. Its highly flexible and allows users to **easily configure and structure all data records** to meet specific needs.

Our IDM ensures wealth managers and investment managers can trust the accuracy and reliability of their product data, as well as the reporting generated from it.



“Our industry experience and knowledge, combined with a history of close collaboration, set us apart and enable us to deliver comprehensive solutions for our clients”



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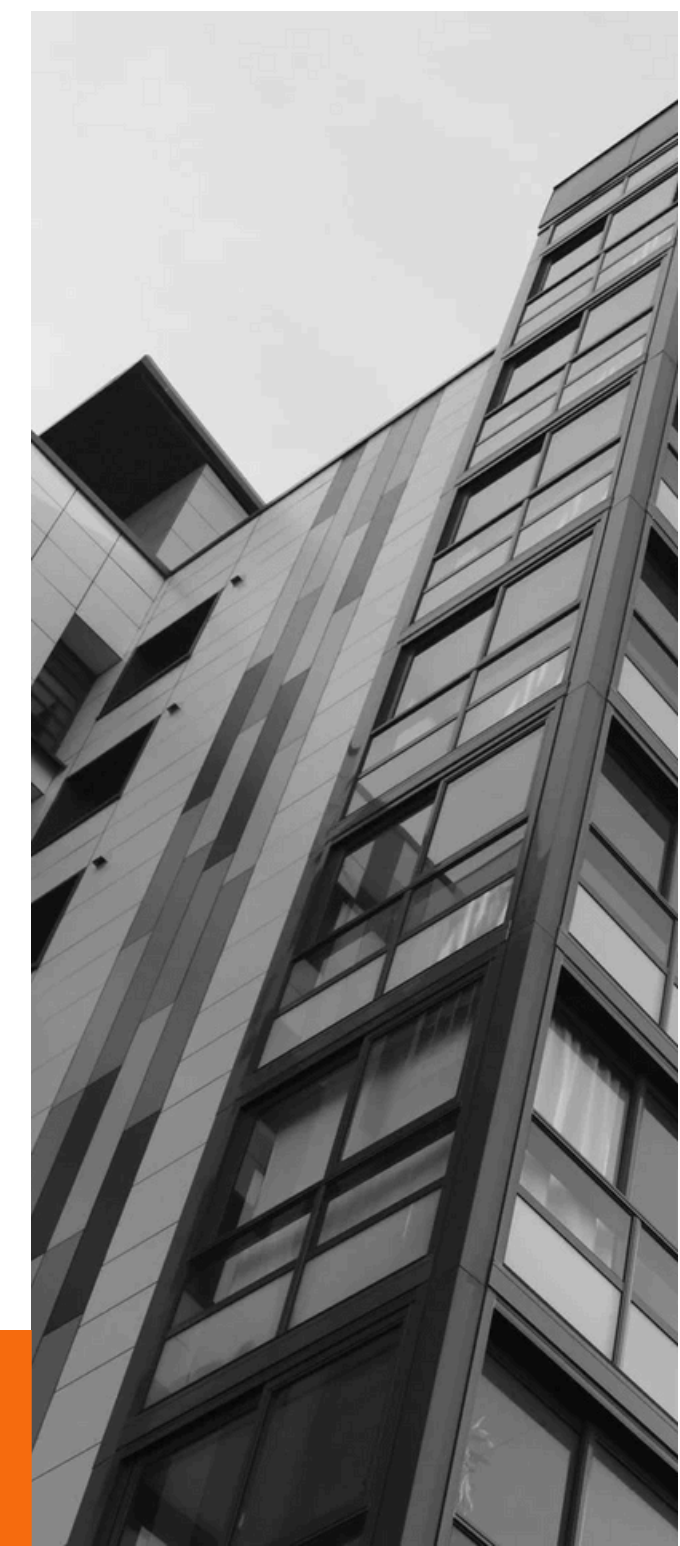
INDUSTRY ISSUES

The cost of data maintenance is high and often this is due to poor data management practices and not having the right data governance tools.

Many firms still use spreadsheets to store all their product data and client data. Spreadsheets are not secure and often there are multiple versions in use. The lack of robust data controls also increases the risk of using incorrect data.

Some firms use technology solutions that do not meet user requirements meaning that business teams supplement the short comings of these technology solutions with spreadsheets. This results in limited use and lack of confidence in the data records maintained on such technology solutions.

Reporting requirements are on the increase and many wealth and investment managers do not have right tools to support their reporting requirements. Also, many firms update or create their client and regulatory reporting information offline which is inefficient.



OUR SOLUTION - INSIGHTS DATA MASTER

The cost of data maintenance is high. Often this is due to poor data management practices and not having the right data governance tools.

Key Features and Functionality:

- **Data Repository:** Define, structure and capture your product data in a way that is understood by your business.
- **Intuitive interface designed by industry professionals:** Meets the Web Content Accessibility Guidelines (target 'AA').
- **No Code and Highly configurable:** Determine and structure the data records you want maintain without the need for coding.
- **User Definable Table Nesting:** Users decide parent-child relationships between data tables.
- **Document attachment:** Attach documents or links to desired data fields.
- **User Permissions:** Definable user profiles and permissions management.
- **Data ingestion:** Ingest data into the platform either via manual load or API.

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We combine technology and innovation with industry know-how to help you stay on top of regulations, boost efficiency, and maintain strong governance.

BENEFITS - INSIGHTS DATA MASTER

- **Trusted Golden Source:** Delivers confidence in the data you hold and will be easily adopted by your entire business.
- **Secure, Cloud Based Solutions:** A scalable solution with increased flexibility, reliability and efficiency which helps to lower IT costs. You can also access your product data from anywhere and on any device.
- **Highly configurable:** Determine and structure the data records you want maintain.
- **Data Governance:** Achieve robust data management controls allowing you to unlock value from all the data you hold.
- **Reporting:** Create and maintain your reporting in a single place. IDM also powers your documentation production, for example the EMT.
- **Workflow Management:** Determine how you structure and coordinate what information is maintained and reported.



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WHY DEVLIN MAMBO

SIMPLICITY

Our products aim to **simplify processes** and encourage effective governance.

We prioritise **practical**, value-added features over complex solutions.

Our solutions are **designed to integrate** with your business processes without the need for extensive implementation projects.

We offer collaborative setup **assistance and training**, enhancing efficiency from the outset so you can start saving time and money straight away.

EXPERTISE

Our experts **understand asset management** challenges, work closely with asset managers, and integrate **industry knowledge** into solutions that can mitigate key risks.

We are a diverse team consisting of software developers and **industry professionals**.

Our **experienced** development team come from backgrounds in FinTech, User Insights, eCommerce and EduTech sectors.

Based in London and Edinburgh, we provide **real-time accessibility**.



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Thank You.

Get in touch

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