



# unity® FACT SHEETS

GAIN CONTROL OVER MARKETING FACT SHEET  
CONTENT AND CREATION

Unity® Fact Sheets automates the process of compiling the information marketing professionals need to create sales tools and investor updates – including performance and holdings information, regulatory disclosures and footnotes, charts and graphs, and manager commentary. Unity Fact Sheets automates reporting from a single source of validated data, saving time and reducing risks associated with error-prone manual processes.

## ▶ FEATURES & BENEFITS



### ONE END-TO-END SYSTEM

Standardize and automate the end-to-end process of collecting data, confirming accuracy and creating marketing fact sheets.



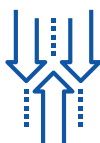
### DATA CONSISTENCY

Centrally source and validate data from various upstream systems to increase efficiency and deliver consistent data across reports.



### AUDIT CONTROL

Increase control with user rights permissions and valuable audit trail of changes made to report drafts.



### AUTOMATED CONTENT CREATION

Improve accuracy, efficiency and control by automating the inclusion of regulatory footnotes and creating charts and graphs directly from a single source of approved, validated data.



### PRINT-READY PRODUCTION

Produce stylized documents in print-ready format, thereby eliminating typesetting costs and proofreading errors.



### SCALABLE

Reduce effort to produce print-ready\* drafts while gaining scalability to add new products without additional resources.

\*Print-ready output through Microsoft® Word files provides a reasonably similar, but not exact replication of third-party typeset materials.



## ABOUT CONFLUENCE

As a global leader in data-driven solutions for efficiency and control, **Confluence** solves tough data management and automation challenges for the asset management industry, including performance reporting, regulatory reporting, investor communications and fund expense management.

**Confluence** solutions enable asset managers and third-party administrators to consolidate and leverage data across business operations which results in lower costs, reduced risk, decreased reporting turnaround times and the scalability to automate more processes without additional resources.

The platform features solutions to support a wide array of fund types – including mutual funds, ETFs, alternative investments, institutional portfolios and UCITS funds.

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