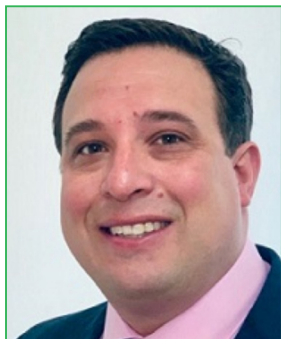


# Best Outsourcing Provider to the Sell Side: Broadridge



## Product: Broadridge Financial Services Business Process Outsourcing (BPO)



**Kevin Moran**  
Broadridge

“The past 12 months have been some of the most tumultuous and unpredictable months in history, forcing the financial services industry to handle new challenges and navigate uncharted waters to ensure global economic sustainability. Operational resilience and business continuity have been, and will continue to be, a top priority for financial services, and our BPO solution is a key pillar in our client’s resiliency plans and target operating model. At Broadridge, we understand that what you do next matters most, and our BPO is built to support our clients, current and future, handle what lies ahead. Our BPO has been recognized by WatersTechnology as best-in-class in years’ past, and I believe our BPO has only strengthened our position as best outsourcing provider to the sell side over the last 12 months.” **Kevin Moran, managing director, global head of Broadridge Business Process Outsourcing**

### WHAT’S NEW

#### BPO-ON-DEMAND:

• Broadridge developed a new solution called BPO-on-Demand, which provides clients with the ability to manage workloads by utilizing its operational experts around the globe when they are needed most. This solution supports existing BPO clients, for functions not currently outsourced to BPO; existing Broadridge technology clients that do not leverage BPO solutions today; and non-Broadridge clients, as the BPO solution is technology-agnostic.

• The company rolled out its new middle-office and loan processing services for both buy-side and sell-side clients. Stemming from a recent Broadridge acquisition of ClearStructure, Broadridge BPO generated a business process offering wrapped around Sentry, a cloud-based, portfolio management application built for portfolio managers, investment analysts, risk professionals, and operations teams.

• Within the last 12 months, Broadridge partnered with PPI AG, a Hamburg, Germany-based payments supplier, to launch a joint payments initiative for banks and financial institutions in Europe. The BPO PaaS solution has already signed one large client, set to go live in 2021, and has a strong pipeline of European financial institutions.

### WHAT’S TO COME

• One area of focus for Broadridge BPO is the exchange-traded derivatives marketplace, where it provides future commission merchants (FCMs) a front-to-back technology, operations, and risk management solution for multi-asset class.

• The company is also looking to grow its support capabilities to the buy side with operational and risk management expertise in middle-office functions, back-office functions, and loan servicing.

**50%**

Expanded BPO’s location footprint by 50% in the last 12 months.

**30%**

Increased scope of services utilized by 30% of existing clients and increased overall client pool by 10%.

**5%**

Increased its global firm headcount by 5%



### WHY THEY WON

Broadridge has claimed this title for six years running, thanks to the continued development of its business process outsourcing solution. Over the last year, it introduced BPO-on-Demand, a technology-agnostic offering that allows clients to leverage its operational experts worldwide. Broadridge also uses emerging technologies such as artificial intelligence and machine learning to enhance clients’ experience and mitigate risk.