

Markit EDM Reporting

A hosted investor reporting and document delivery service that consolidates data from any source

Markit EDM Reporting is a hosted investor reporting and document delivery service, which provides a rich user experience in a fully controlled environment.

The ability of a financial firm to serve its clients is dependent on the quality, timeliness and flexibility of its investor reporting platform. EDM Reporting has been designed to address these requirements and provides a single platform that can be leveraged for a wide range of use cases, including the creation of online dashboards, factsheet construction, document publishing, statement delivery and interactive reporting.

200,000+

user accounts

2.5m+

documents managed monthly

900bn+

in assets under management or administration

Customers

Institutional managers
 Prime brokers
 Fund administrators
 Investment banks and brokers
 Private banking and wealth
 Hedge funds

More information

For more information on the products and services from Markit, please contact us at sales@markit.com or call one of our regional offices:

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Content management

EDM Reporting is delivered with a library of enrichment services, calculation functions and disclosure management tools, which enable users to build content on demand. The content management capabilities can be integrated with Markit EDM, which provides a library of adaptors to external data feeds and applications.



Presentation templates

EDM Reporting allows users to present results using visual and interactive navigation tools. Intuitive interfaces allow users to adjust queries on reports without the need to contact a web developer for each change.



Leveraged infrastructure

EDM Reporting has been built to address the huge increases in data volumes and user numbers in the industry, and supports 200,000+ users and a significant number of page views per week. Application availability and uptime are maintained 24/7/365 by technical support staff around the world.



Multi-channel distribution

EDM Reporting offers an end-to-end investor reporting experience that ensures firms can deliver a consistent user experience and brand in supported browsers, mobile devices and print-ready formats (PDF, Excel etc.).

EDM Reporting consolidates data and documents from any source into a set of interactive dashboards, addressing information delivery needs.

Hundreds of pre-defined data enrichments and workflow templates have been created to ensure EDM Reporting's web, print and mobile delivery platforms are accurately updated and auditable 24/7/365.

PRESENTATION

Websites

White-label investor reporting websites are designed, built and serviced on behalf of financial firms.

Mobile

Websites are built to work within mobile infrastructure, including support for iOS and Android.

Reports

Innovative print artefacts with visual displays, charts and tables are designed to showcase data.

CONTENT

Documents

EDM Reporting supports processing for newsletters, tax documents and legal notices at the firm, fund and investor level.

Data

Firms are given the ability to communicate ideas through visual and interactive design.

Commentary

Online content editors allow authorised users to maintain commentary, disclosures and footers.

DESIGN

Layout

Users can apply interactive settings to dashboards from any underlying dataset.

Charting

Online editors allow users to set presentation options for charts and other graphical views.

Style sheets

CSS style sheets deliver an end-to-end user experience designed to ensure consistent presentation and brand.

CONTROL

Workflow

A central workflow engine enables authorised users to associate incoming content with templates that automate processes.

Alerts

Notifications are automated throughout the approval and exception management lifecycle.

Entitlements

Security controls are enabled by an in-memory entitlements engine.