

# Charles River Mobile

## Real-time, 'Big-Picture View' of Key Investment Management Activities

Charles River Mobile offers financial advisors, portfolio managers, compliance officers and other investment professionals secure, remote access to critical Charles River Investment Management Solution (IMS) information via IOS and Android devices. An intuitive dashboard makes it easy to manage accounts, orders, trades, and alerts when away from the office.

Leveraging the best of mobile application technology, portfolio managers can monitor asset allocations, track portfolio exposures, use basic order generation functionality, and see the latest trade information. Users can view alerts and take appropriate action, including responding to new compliance issues. Charles River Mobile also allows financial advisors to make in-person client meetings more interactive by using tablets as graphical reporting and presentation tools.

### Key Capabilities

- Account deviations/drifts
- Cash activity
- Compliance alerts
- Overall asset allocation
- Holdings by category
- Top 10 positions
- Real-time market values
- Basic order generation capability
- Open Orders and Trades



Stay up-to-date on key investment activities and take appropriate action when away from the office.

On-demand reports and graphs make in-person client meetings more interactive and engaging.



A State Street Company

## ABOUT CHARLES RIVER

**Charles River Development, a State Street Company, enables sound and efficient investing across all asset classes. Investment firms in more than 40 countries use Charles River IMS to manage more than US\$25 Trillion in assets in the institutional investment, wealth management and hedge fund industries. Our Software as a Service-based solution (SaaS) is designed to automate and simplify investment management on a single platform – from portfolio management and risk analytics through trading and post-trade settlement, with integrated compliance and managed data throughout. Headquartered in Burlington, Massachusetts, we support clients globally with more than 750 employees in 11 regional offices.**

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