

CASE STUDY



Re-designing, improving and fully automating the Fund Factsheets at Royal London Asset Management

## Following the successful implementation of Opus Nebula's Reporting as a Service® solution for their Quarterly Investment Reports for the Institutional and Wholesale businesses, RLAM have now migrated Fund Factsheets from their legacy provider onto the same platform.

As well as fully automating the production process, RLAM used Opus Nebula's design service to review and refresh the Factsheets, following their internal brand guidelines and industry best practices to deliver Factsheets of the highest quality. Additionally, RLAM Factsheet production is now at share-class level, and the content is specific to the fund and the investor, including local language versions and overseas variants, something that was more time consuming and costly with the previous vendor.

**“The flexibility, control and scale we have with Opus Nebula reporting system is unlike anything we have had before. Producing the high volumes and variety of Factsheets we needed required something more bespoke and tailored for our needs.”**

Paul Peristiane, Head of Reporting at RLAM

The core Reporting as a Service system was already familiar to the RLAM teams, so the on-boarding of the Fund Factsheets was straightforward and fast. The existing data feeds were simply extended to provide monthly data, and the Factsheet templates configured to provide exactly the required output for each specific fund type utilising all the relevant data available.

Paul Peristiane, Head of Reporting at RLAM, comments, “Adding a further set of reports to the system has been quite straightforward for the RLAM team and, once again, the Opus Nebula resources have shared their expertise and energy to on-board us in the most efficient manner.”

Producing high volumes of local language Factsheets, at share class level can be a challenge. The Reporting as a Service system from Opus Nebula has such flexibility, power and scale that the RLAM teams can produce their



Factsheets exactly as required, on time, every time.

Jez Harris, Change Manager at RLAM, comments, “RLAM have found a supplier that has become a trusted partner, and works with us to provide an outstanding service to our clients, investors and internal teams. We have a multi-phase approach to our rollout, and will continue to migrate from legacy processes and systems to the Opus Nebula reporting environment.”

The on-boarding project was managed via a joint project plan and regular project meetings, with agreed steps, dependencies and milestones. Jez remarked, “Because we are now very familiar with the project approach, and because we were re-using and extending existing data feeds, this project was very simple to manage and deliver.”

Reporting as a Service provides a multi-tenanted SaaS system for the RLAM reporting teams to manage and control the entire end-to-end reporting process. From data ingestion, data validation, through report scheduling, report production, review, approval and report storage. Additionally, the reporting system provides control to the users, so they can add and adjust content very simply and exactly as they require.

# Reporting as a Service®

## the Opus Nebula solution

We believe that investment firms should have access to the very best client reporting solution available to provide complete, accurate, timely and tailored reporting to their clients. But firms no longer need to build and host the system themselves.

Opus Nebula's Reporting as a Service system provides a complete end-to-end and pre-built client reporting solution to wealth and asset management firms, family offices, asset servicers and pension schemes. The cloud-based solution enables firms of all sizes to provide world-class reporting personalised to their clients in an efficient and affordable basis.

The Reporting as a Service system integrates easily with golden data sources and simple user dashboards control the report preparation, production and publication processes.

All completed reports and their full audit trail are automatically stored in the document library for future reference.

For more information about Opus Nebula, please visit: [www.opus-nebula.com](http://www.opus-nebula.com)

### About RLAM

Royal London Asset Management is one of the UK's leading fund management companies, managing assets on behalf of a wide range of clients totalling £169.3Bn\* RLAM was established in 1988 and is part of the UK's largest mutually owned pension and investment company.

RLAM help a wide range of clients across the globe achieve their investment goals, with a commitment to managing their clients' assets in the right way.

RLAM is authorised and regulated by the Financial Conduct Authority.

Read more about by visiting: <https://www.rlam.com/uk/>

\* As at 31st March 2024.



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