

Enfusion Launches Portfolio Workbench, Empowering Portfolio Managers to Seamlessly Rebalance Multi-Asset Portfolios

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NEW YORK & LONDON & HONG KONG--(BUSINESS WIRE)-- Enfusion, Inc. ("Enfusion") (NYSE:ENFN), a leading provider of a cloud-native software-as-a-service ("SaaS") platform for investment managers and asset owners, announced today the release of Portfolio Workbench, new platform functionality that empowers portfolio managers ("PMs") to seamlessly manage and adjust their portfolios using a highly-intuitive user interface.

Portfolio Workbench Overview

Building on Enfusion's extensive reporting capabilities, Portfolio Workbench now enables PMs to not only view their portfolios, but to leverage in-grid editing to intuitively rebalance those portfolios across multiple strategies and investment vehicles. As in-grid adjustments are made, Portfolio Workbench automatically proposes orders and allocations.

When PMs are ready to proceed, they can seamlessly test for compliance before order instructions are queued and sent directly to their traders for execution. The tool fully integrates compliance checks within the main user interface, allowing users to manage their entire workflow from a single screen.

Key Features & Use Cases

Incorporating feedback from dozens of Enfusion clients, Portfolio Workbench unlocks highly-requested use cases for both alternative and traditional investment managers. For traditional asset managers who use model portfolios or track relative performance, as well as alternative managers running strategies across multiple vehicles and

accounts, the functionality simplifies portfolio management and supports a multitude of workflows.

Legacy PM workflows rely on verbal instructions to communicate portfolio changes to a trader, making it difficult to size orders compliantly, while existing software tools require jumping between multiple screens or systems to make adjustments and review orders. Portfolio Workbench brings the entire workflow into a single streamlined interface to save time, reduce errors and ensure compliance.

An intuitive user interface allows PMs to make in-grid portfolio edits and view their changes without losing content. PMs can adjust weights and exposures for various portfolio dimensions such as sectors, and rebalance positions across multiple funds, as well as view and modify proposal orders and allocation directly within the interface. Logical workflows enable PMs to quickly test pre-trade compliance and model upcoming subscriptions and redemptions across multiple investment vehicles in several different ways.

A Leap Forward for Enfusion's Platform

The release of Portfolio Workbench marks a major milestone on Enfusion's journey to becoming the go-to platform for investment managers of all types. This capability offers enhanced support for strategies ranging from traditional equity to fixed income to multi-asset portfolios in multi-currency settings.

"As we expand our footprint with traditional asset managers," said Dan Jacobs, Enfusion's Chief Revenue Officer, "Portfolio Workbench is an essential component that allows front-office users to more easily manage performance and risk against a benchmark and go seamlessly from portfolio construction to order management and execution and back."

"Our vision is to be the most invaluable, impactful and innovative technology platform within the global capital markets infrastructure," added Enfusion's Chief Executive Officer, Oleg Movchan. "This new functionality enables Enfusion to solve for even more of the complex workflows of large institutions by extending platform capabilities to support investment decision-making and portfolio implementation."

Portfolio Workbench is available now as a limited beta offering and will expand to general availability by the end of the year. Future releases will bring additional enhancements.

About Enfusion

Enfusion's investment management software-as-a-service platform removes traditional information boundaries, uniting front-, middle- and back-office teams on one cloud-native system. Through its software, analytics, and middle/back-office managed services, Enfusion creates enterprise-wide cultures of real-time, data-driven

intelligence and collaboration boosting agility and powering growth. Enfusion partners with over 800 investment managers from 10 global offices spanning four continents.

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