

Data Management Insight Awards USA 2023 Winners' Report

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About Data Management Insight Awards – USA 2023

Congratulations to the winners of A-Team Group's Data Management Insight Awards - USA 2023. These awards recognise both established solution vendors and innovative newcomers providing leading data management solutions, services and consultancy to capital markets participants across the USA.

The awards were presented during a lively drinks reception after the close of A-Team Group's 28 September 2023 Data Management Summit in New York City.

The awards included more than 30 categories of data management solutions and services ranging from Best Data Solution for Regulatory Compliance to Best Data Lineage Solution, Best Data Solution for Digital Assets, Best Entity Data Solution, Best Proposition for AI, Machine Learning, Best Data Quality Analysis Tool, and more.

An editor's recognition award for Data Management Industry Professional of the Year was presented to Dessa Glasser, Independent Board Member at Oppenheimer Holdings; Chair at the Global LEI Foundation (GLEIF) and Principal at The Financial Risk Group.

Thank you to all the vendors that entered A-Team Group's Data Management Insight Awards – USA 2023, to our Data Management Insight community that voted for its preferred solutions, and to our independent, expert advisory board that worked in collaboration with our editorial team to select this year's winners.

Finally, our compliments to all the award winners, who should be deservedly proud of their achievement in a closely fought and highly competitive contest.

If you would like your company to be considered for future Data Management Insight Awards in the USA or Europe **click here**, where you can either enter your details to be notified when we open for nominations, or submit your entry if we are already open for nominations.



Andrew Delaney
President & Chief Content Officer
A-Team Group

I'd personally like to thank our advisory board for their time and valuable input.

David Wright

Divisional Chief Data Officer - Enterprise Data Management
BNY Mellon

Brian Greenberg

Senior Director - Business Engagement Lead for Enterprise Data Management
BNY Mellon

Julia Bardmesser

Technology, Data and Architecture Executive

Jennifer Ippoliti

Legal Chief Data Officer
JP Morgan Chase

Dessa Glasser

Independent Board Member at Oppenheimer Holdings; Chair at the Global LEI Foundation (GLEIF) and Principal at The Financial Risk Group

Suryakant Brahmhatt

Global Head of Cloud Data Strategy & Architecture
Morgan Stanley Wealth Management

Ellen Gentile

Data Quality Leader
Edward Jones

Arvind Joshi

Head of Data Governance & Analytics
Rockefeller Capital Management

Peter Giordano

MD, Oppenheimer & Co

Victor Tewari

Senior Vice President - Wealth Management & Private Banking - Chief Data Office
Citi

Yinghua Michelle Zhou

Chief Data Officer
Nuveen

Andrew Foster

Chief Data Officer, M&T Bank

NICE
Actimize

ClarityKYC

X-Sight
DataIQ

The FIRST STEP in Effective Risk Management



With NICE Actimize's DataIQ ClarityKYC SaaS solution, you can accelerate the onboarding of customers, conduct ongoing reviews, and stay compliant with numerous regulatory challenges.



niceactimize.com/data-intelligence

NICE Actimize

Winner: Best Data Solution for Regulatory Compliance

NICE Actimize X-Sight DataIQ ClarityKYC Addresses Customer Onboarding As First Step in Effective Risk Management

Named this year's Best Data Solution for Regulatory Compliance, NICE Actimize's X-Sight DataIQ ClarityKYC helps financial institutions comply with ever-evolving regulations by aggregating many open and premium sources with powerful search and matching capabilities and a regulatory-driven library of automated requirements and enrichment.

"Customer onboarding is a critical first step in any financial services organization's risk management strategy. Onboarding new customers and conducting ongoing reviews presents numerous competitive challenges which include managing ever-changing regulations, and NICE Actimize's DataIQ ClarityKYC addresses these issues effectively," said Ajit Tharakan, General Manager, Data management, NICE Actimize.

The focus of NICE Actimize's DataIQ ClarityKYC is to provide cloud-native, rapid-deployment and a way to allow access to a vast number of reliable data sources. With deployments that can take a few days instead of months and with multiple ways for clients to load data into the system, financial institutions can benefit from the system immediately.

Another benefit of the SaaS nature of DataIQ ClarityKYC is its ability to continuously keep the system up to date with the ever-changing APIs and attributes of the different data vendors, allowing clients to continue leveraging them without having to make large spends on maintenance, data mapping exercises, and validations. Proactive monitoring of the data enables DataIQ ClarityKYC to react to data changes and potential issues immediately and resolve them once across all our clients instead of having to rely on one-off processes.

Many compliance requirements rely on accurate and up-to-date data from multiple sources – corporate and personal information, identification documents, historical news searches, and more. As the regulations evolve, new sources of required data are constantly added including lists of crypto exchanges, Marijuana-related businesses, darknet breaches, and more.

For structured data, NICE Actimize uses an advanced 4th-generation cultural name-matching engine to provide fuzzy name matching while keeping false positives low. The solution combines many filtering mechanisms for unstructured data alongside an ML-driven similarity engine to reduce duplicate address requirements.



About NICE Actimize



www.niceactimize.com

NICE Actimize's X-Sight DataIQ ClarityKYC is a SaaS workflow solution designed to simplify KYC for financial services organizations. The solution facilitates compliance with KYC/Anti-Money Laundering (AML) requirements by integrating disparate datasets and streamlining the customer identification, due diligence and credit investigation process. Leveraging advanced AI, the solution has successfully helped many financial institutions address those needs by collecting and aggregating information from ever-automated manual processes and reducing user errors. For more information, please go to the website.

Arcesium

Winner: Most Innovative North American Data Management Provider

Arcesium provides clients with an advanced data management platform designed to power the entire investment lifecycle across public and private markets. Unique and context-specific tools enable clients to extract value from their data without replacing existing systems or disrupting their current operating environment.

Today's institutional asset managers are operating in an increasingly competitive environment. Achieving economies of scale to maintain operating margins can be elusive, while launching new strategies to differentiate performance is expensive to implement and hard to scale. These challenges, along with an explosion of data, fragmented systems, error-prone processes, and supralinear cost growth, leave firms at a crossroads.

Arcesium's technology integrates data, workflows, and analytics enabling organizations to simplify investment platforms, migrate off legacy systems, optimize efficiencies, and lower total cost of ownership. By enabling asset managers to future-proof investment and data operations roadmaps, Arcesium empowers firms to support new asset classes and products, improve analytics and reporting, sharpen data strategies, and make the most of emerging operating models.



About Arcesium



Arcesium delivers an advanced data, operations, and analytics platform used by some of the world's most sophisticated financial institutions, including hedge funds, banks, institutional asset managers, and private equity firms. We designed our elegant SaaS platform with industry-specific capabilities to harmonize massive amounts of disparate data and deliver unparalleled speed, accuracy, and decision-making capabilities. Our exceptionally consultative and collaborative approach coupled with deep domain expertise helps our clients achieve transformational business outcomes.

www.arcesium.com

BMI

A Fitch Solutions Company

Winner: Best Index Data Provider

In an uncertain macroeconomic environment, BMI's systematic, independent and data-driven market insights, analysis and forecasts enable you to recognize and assess risks and opportunities across 200+ markets and 20+ industries.

For almost 40 years, we have provided impartial and transparent analytics, data and research across themes, countries and sectors. You receive intelligence that is deep and detailed, helping you identify opportunities and risks relevant to your strategic plans and investment decisions. Information is delivered in a consistent and systematic manner, enabling you to make comparisons and interrogate our extensive and frequently updated datasets.

Our experienced analysts appreciate how broader macroeconomic, political, sectoral and operational issues interconnect with their specialist fields. With this context, we publish definitive economic forecasts backed by sound connected thinking covering the interplay between economic, political and operational risks.

As each analyst focuses on select fields, they understand the nuances and complexities of their specialist areas, enabling them to provide you with additional insight into our research when you need it.

BMI is a Fitch Solutions Company, part of the Hearst-owned Fitch Group, a global leader in financial information services with operations across the world.



About BMI, A Fitch Solutions Company



BMI helps clients to identify opportunities and navigate risks in markets where high-quality information is hard to find and difficult to interpret, with authoritative, in-depth and frequent coverage of countries, industries and politics. BMI is a Fitch Solutions Company, part of the Hearst-owned Fitch Group, a global leader in financial information services with operations across the world.

fitchsolutions.com/bmi

Rocket Software

Winner: Best Data Lineage Solution

Rocket® Data Intelligence is a metadata discovery and management solution that enables end-to-end views of data, its movement, and context for business meaning. Organizations gain data insights that are understood and trusted by both technical and business users across the enterprise, enabling users to leverage the data assets that underpin business-critical data transformation, management, and governance initiatives.

The platform is built on automation that spans cloud, distributed, and mainframe infrastructures, and can manage the complex environments of the world's largest organizations, regardless of how they are using their data.

Regardless of a user's background in data, they can take advantage of this platform.

- Data teams can focus on delivering the unique value that comes from exceptional data, including uncovering opportunities to optimize costs, and reduce compliance exposure.
- IT can improve upfront planning for the data components of an IT modernization or growth initiative, thus leading to quicker and more reliable outcomes.
- Lines of Business can execute business reporting more efficiently to free up resources for garnering data insights.

In short – this innovation is entirely reshaping how industries leverage their data, helping both technical and non-technical users become more data-informed.



About Rocket Software



www.rocketsoftware.com

Rocket Software partners with the largest Fortune 1000 organizations to solve their most complex IT challenges across Applications, Data, and Infrastructure. Rocket Software brings customers from where they are in their modernization journey to where they want to be, by architecting innovative solutions that deliver next-generation experiences. Over 10 million global IT and business professionals trust Rocket Software to deliver solutions that improve responsiveness to change and optimize workloads. Rocket Software enables organizations to modernize in place with a hybrid cloud strategy that protects investment, decreases risk, and reduces time to value.

S&P Global Market Intelligence

Winner: Best Corporate Actions Solution

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our unified Corporate Actions Solution brings together a unique combination of enterprise technology solutions and managed data services that help global firms across all tiers and segments to reduce risk and increase operational efficiency.

Customers leverage our global team of business and technology experts, as well as our proven implementation capabilities, to transform their operating model where the engaged user community drives the evolution of our products.

Our unified Solution enables customers to automate the entire corporate actions event processing lifecycle providing real-time workflow and risk monitoring to execute end-to-end processes. Supported by user-friendly dashboards and self-service analytics, customers can eliminate the challenges of collecting and validating corporate actions data, integrated into our industry leading platforms. This integrated solution is designed to support corporate actions processing requirements across a range of asset classes, markets, client types, and business lines worldwide.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI). S&P Global is the world's foremost provider of credit ratings, benchmarks, analytics and workflow solutions in the global capital, commodity and automotive markets



About S&P Global Market Intelligence

S&P Global Market Intelligence

www.spglobal.com

Monitor and manage the risk and complexities of your corporate actions operations with the S&P Global Market Intelligence Corporate Actions Solution. The only solution that brings together the power of award winning validated golden-source data and an industry leading corporate actions processing platform. Our unified Corporate Actions solution helps firms across a range of asset classes, market client types and business lines, to reduce their risk and automate, strengthen and accelerate their corporate actions processing.

S&P Global Market Intelligence

Winner: Best Data Provider to the Sell-Side

S&P Global Market Intelligence is a world-leading provider of financial information services and a division of S&P Global (NYSE: SPGI).

Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

We bring transparency, cutting-edge research, and business intelligence to markets worldwide. Our deep sector-specific intelligence includes energy, financial institutions, fintech, industrials, maritime & trade, metals & mining, TMT, real estate, retail, and construction.

A wide range of customers rely on us across capital markets, corporations, professional services, governments, academia, and to commercial banks. With a deep understanding of our customers' needs, we stand alongside our clients to help solve their most complex business challenges.

First established in 1860, our legacy is built on finding and knowing the essential. Most recently, in 2022, S&P Global Market Intelligence and IHS Markit's Financial Services division united with the goal of helping customers harness the volume and velocity of data in ways that unlock progress for us all.



About S&P Global Market Intelligence

S&P Global Market Intelligence

www.spglobal.com

At S&P Global Market Intelligence, we understand the importance of accurate, deep, and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI). We are the world's foremost provider of credit ratings, benchmarks, analytics, and workflow solutions in the global capital, commodity, and automotive markets.

SmartStream Technologies

Winner: Best Sell-Side Data Management Platform

SmartStream has become a trusted partner that deliver automation and control the world's leading capital markets, buy-side firms and corporations. The demands of the industry particularly at times of transformation has allowed us to grow, introducing new solutions and winning multiple industry accolades.

SmartStream's solutions and services span the transaction lifecycle and incorporate the latest AI and machine learning technologies. These can be accessed in a variety of ways, for example, via APIs and micro-services, or deployed as managed services and cloud environments.

SmartStream has a wide range of solutions and services in the areas of:

- Cash & Liquidity Management
- Collateral Management
- Corporate Actions Processing
- Digital Payments and Investigations
- Fees and Expense Management
- Post Trade Processing
- Reconciliations and Exceptions Management
- Reference Data



About SmartStream Technologies



SmartStream is a recognised leader in financial transaction management solutions that enables firms to improve operational control, reduce costs, build new revenue streams, mitigate risk and comply accurately with regulations. By helping its customers through their transformative digital strategies, SmartStream provides a range of solutions for the transaction lifecycle with artificial intelligence and machine learning technologies embedded – which can also be deployed in the cloud or as managed services.

www.smartstream-stp.com

Data Management Industry Professional of the Year

Dessa Glasser
Principal, Financial Risk Group

Dessa Glasser is FRG's Principal for the Data Strategy Advisory & Analytics practice, providing innovative solutions to clients in data, risk, and analytics. She is an Independent Board Member of Oppenheimer & Co. Inc; and Chair of the Global Legal Entity Identifier Foundation (GLEIF). Before joining FRG, Dessa was the Managing Director at JPMorgan Chase, responsible for the Capital Stress Testing Analytics and was the Chief Data Officer for Asset and Wealth Management. As Deputy Director of the Office of Financial Research, she received the US Treasury Exceptional Service Award. Dessa was the Chief Risk Officer for Bunge and held senior positions at Credit Suisse, Merrill Lynch, IBM, and KPMG. Dessa has a B.S. from Fairleigh Dickinson University and a Ph.D. and M.A. in Economics from Fordham University, where she is on the Advisory Board for the Graduate School of Arts and Sciences. .



Winner: Best Buy-Side Data Management Platform

Alveo

Alveo is the leader in market data integration and analytics solutions for financial services. Focused on optimizing data flows for business user self-service, we provide cloud-native data aggregation and data quality management that enables clients to easily access trusted data while maximizing their data ROI. Through our managed services and DaaS solutions, we ensure that clients can smoothly onboard, prepare and validate data for use in operations, trading, investment management, pricing, risk, reporting and machine learning.

www.alveotech.com



Winner: Best Data Solution for Digital Assets

Amberdata

Amberdata is the leading provider of digital asset data, market intelligence and risk analytics. We deliver comprehensive data and insights into blockchain networks, crypto markets, and decentralized finance, empowering financial institutions with data for research, trading, risk, analytics, reporting, and compliance. Amberdata serves as a critical piece of infrastructure for financial institutions entering the asset class and participating in digital asset markets.

www.amberdata.io



Winner: Best Standards Solution for Data Management

Association of National Numbering Agencies (ANNA)

Established in 1992, ANNA is the membership organisation of national numbering agencies (NNAs), which are operated by depositories, exchanges, government agencies, nationally central data vendors and other financial infrastructure organisations. The number of NNAs now surpasses 120 jurisdictions globally. ANNA serves as the registration authority for the ISIN and FISN standards, under appointment by ISO. Under ANNA's stewardship, the role of the ISIN in enabling global financial communications has been established worldwide.

anna-web.org



Winner: Best Entity Data Solution

Bureau van Dijk a Moody's Analytics Company

At Bureau van Dijk, a Moody's Analytics company, we capture and treat entity information for better decision-making and increased efficiency. With information on over 462 million companies worldwide, Orbis is the resource for entity data. It includes comparable information, extensive corporate ownership details and comprehensive coverage, combining data from hundreds of sources.

www.bvdinfo.com



Winner: Best Proposition for AI, Machine Learning

Canoe Intelligence

Canoe Intelligence redefines alternative investment data processes for hundreds of leading institutional investors, capital allocators, asset servicing firms, and wealth managers. By combining industry expertise with the most sophisticated data capture technologies, Canoe's technology automates the highly-frustrating, time-consuming, and costly manual workflows related to alternative investment document and data management, extraction, and delivery. With Canoe, clients can refocus capital and human resources on business performance and growth, increase efficiency, and gain deeper access to their data.

canoeintelligence.com



Winner: Best North American Consultancy in
Data Management

Capco

Capco, a Wipro company, is a global technology and management consultancy specializing in driving digital transformation in the financial services industry. With a growing client portfolio comprising of over 100 global organizations, Capco operates at the intersection of business and technology by combining innovative thinking with unrivalled industry knowledge to fast-track digital initiatives for banking and payments, capital markets, wealth and asset management, insurance, and the energy sector.

www.capco.com



Winner: Best Data Quality Analysis Tool

Datactics

Datactics specialises in no-code, self-service data quality and matching software augmented with machine learning. We provide robust solutions and expert professional services supporting data leaders in highly regulated industries, including banks, information vendors and governments to measure, report and improve data quality. Our platform is typically implemented in customer private cloud (Azure, AWS etc.) environments and integrates and interoperates with leading data lineage, governance and catalog tooling to deliver seamless, best-of-breed enterprise data management.

www.datactics.com



Winner: Best Sell-Side Managed Services Platform

GoldenSource

GoldenSource EDM is optimized for the next wave of business, operations and IT needs, addressing the evolving demands of multi-regulatory compliance and reporting, harmonized data across the organization, and productivity gains through automation and IT rationalization.

www.thegoldensource.com



Winner: Best Pricing & Valuations Data Provider

Refinitiv an LSEG Business

Refinitiv, an LSEG (London Stock Exchange Group) business, is a leading provider of financial markets data and infrastructure. With a global presence, we serve over 40,000 customers and 400,000 end users in 190 countries. Our comprehensive information, insights, and technology empower customers to make confident investing, trading, and risk decisions. Through our open platform and industry expertise, we connect people to opportunities, driving performance and growth for our customers and partners.

refini.tv/3OkucWz



REFINITIV 

An LSEG Business

Winner: Best Buy-Side Managed Services Platform

Rimes

Rimes is an enterprise data management partner to the global investment community. Driven by our passion for solving the most complex data problems, we provide our clients with investment intelligence that powers more than 50 trillion in AUM annually. The world's leading institutional investors, asset managers and service providers rely on Rimes to help them make better investment decisions using accurate information and industry-leading technology. Headquartered in New York and London, Rimes services its global clients through offices in Europe, the Americas and Asia Pacific.

www.rimes.com/solutions/enterprise-data-management



rimes

Winner: Best Corporate Actions Data Provider

SIX

SIX is a leading global provider of data and value-added services for the financial markets and investment industry. Aggregated in real-time from 5,000 worldwide sources, Financial Information's data offering covers all the major trading venues. The database includes reference, pricing and market data, corporate actions, regulatory, tax, ESG and alternative data for nearly 30 million instruments. SIX provides a wide range of services supporting the industry when collecting, processing and leveraging global corporate actions.

six-group.com/financial-information



SIX

Winner: Best KYC & Client On-Boarding Solution

smartKYC

smartKYC's technology drives faster, better and more cost-effective KYC at every stage of the relationship – liberating human effort to focus on decision-making rather than laborious research. smartKYC fuses artificial intelligence with linguistic and cultural sensitivity and deep domain knowledge to set new standards for KYC quality, whilst transforming productivity and hardwiring compliance conformance.

smartkyc.com



Winner: Best Cloud-Based Data Management Solution

Snowflake

Snowflake enables every organization to mobilize their data with Snowflake's Data Cloud. Customers use the Data Cloud to unite siloed data, discover and securely share data, power data applications, and execute diverse AI/ML and analytic workloads. Wherever data or users live, Snowflake delivers a single data experience that spans multiple clouds and geographies. Thousands of customers across many industries use Snowflake Data Cloud to power their businesses.

www.snowflake.com/en/solutions/industries/financial-services



Winner: Best Data Governance Solution

Solidatus

Solidatus serves data-rich, highly regulated companies, like HSBC and Citi, by providing an organization-wide, connected governance solution that goes beyond traditional data lineage and catalog offerings. Enterprises are empowered to create live blueprints, visualizing data flows across the organization, connecting them to related processes, policies and obligations, and bridging the gap between IT and business.

solidatus.com



More Data Management Insight Awards – USA 2023 winners

Winner: Best Data Management Initiative for ESG
Bloomberg

Winner: Best Data Provider to the Buy-Side
FactSet

Winner: Best Data Analytics Provider
Moody's Analytics

Winner: Best Data Science Solution
BMLL Technologies

Winner: Best Performance Measurement System
Capital Quant Agency

Winner: Best Data Integration Tool
Hitachi Vantara

Winner: Best Data Solution for Sustainability
MorningStar

Winner: Best Data Discovery and Catalog Solution
Octopai

Winner: Best Graph Database Solution for Data Management
Orion Governance

Winner: Best Solution for Data Privacy
Privitar

Winner: Best Solution for Data Security
Satori

Winner: Best Delivery Platform for Trading and Investment Data
Solve Advisors

Winner: Best Fund Accounting, Portfolio Management & Data Platform
SS&C

Winner: Best Data Visualisation Provider
Tableau

Winner: Best Data Ops Solution Provider
West Highland Support Services

Winner: Best Data Platform for Risk and Portfolio Analytics
Xenomorph

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