

# Accelerated Investment Management



Waterfall Asset Management, LLC is an SEC-registered institutional asset manager focused on structured credit and private equity investments across multiple sectors globally. Waterfall was founded in 2005. As of date 6/1/2020, the company has approximately \$7.8B in assets under management and more than 150 employees.

*"Qlik is pretty much the first thing our traders and portfolio managers access every morning to check their portfolio and pretty much the last thing they close when they end their day."*



**Shamanth Muppidi**

Director, Waterfall AM, NYC, US

## Taking Actions Where The Data Is

Data driven and innovative, Waterfall Asset Management has seamlessly integrated Inphinity Forms into their investment lifecycle. FAST and EASY to implement, the SECURE native writeback technology drives action in real-time – removing clunky spreadsheets and cumbersome internal processes. Not stopping there, Waterfall AM has numerous innovative Forms solutions in the pipeline that will support their business growth.

### Management portal

Portfolio managers start and end their day in Qlik app, checking portfolio status and other key management metrics across the organization.

### Portfolio management

Utilizing Qlik and Inphinity Forms, traders validate the accuracy of their investment attributes like returns in an easy and fast way. It provides the highest level of confidence for investors,

### Resource management

The resource management app allows real-time input to track time spent on functions and investments, supporting improved activity-based-costing and pricing models.

#### Inphinity References





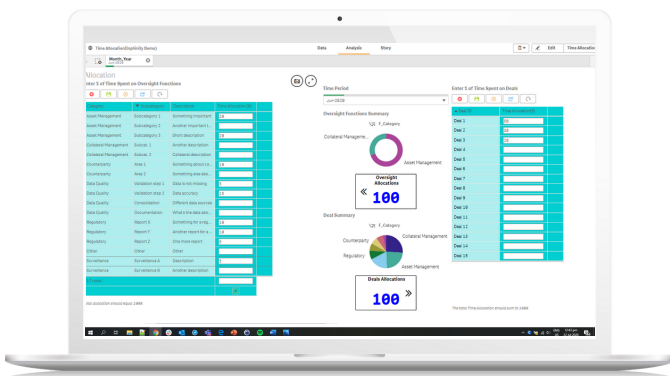
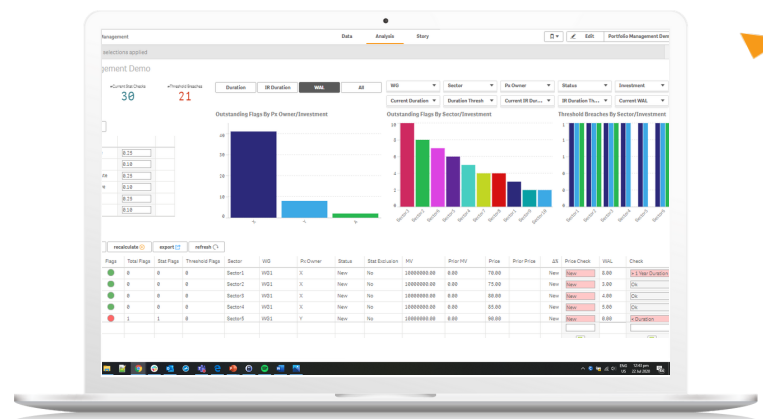
*Inphinity Forms is the 1st natively integrated write-back extension that turns your Qlik Sense into a Swiss knife.*

*Correct the data, discuss it, enter your own notes and share it with your team where the data is - in your Qlik apps.*

Waterfall AM is an inspirational example of a proactive and open-minded customer. Thanks to it together with our customer-centric approach, they developed the first two solutions by using Inphinity Forms write-back extension in a few weeks.

## Data Quality In Portfolio Management

Having accurate and up-to-date data when making decisions about investments is critical. Utilizing Qlik and Inphinity Forms, traders pull up their Qlik app, update, track and validate their investments. Flags and checks are smoothly integrated - removing repetitive and manual processes reduces errors and saves significant amounts of time.



## Resource Management

Accurate data and decisions are at the heart of a successful investment management operation. In Waterfall AM time spent on functions and investments is easily captured, supporting a transparent operating model for customers. Traditional spreadsheets and processes are removed and replaced with a SMART, FAST and EASY workflow in Qlik using Inphinity Forms.



*Inphinity's customer-centric approach has helped us maximize the value of our investment in Qlik with their Inphinity Forms write-back and solve key business processes.*

**Shamanth Muppidi, Waterfall AM**

GLOBAL WEBINAR

Waterfall Asset Management, NYC:

Inphinity Forms In Financial Services

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