

Sectoral Asset Management Delivers Premium Investor Experience With InvestorVision™

Sectoral Asset Management specializes in public equity and venture capital investments in the healthcare sector. The firm chose [SS&C Intralinks InvestorVision](#) to streamline the reporting process for its fund administrators and global investors.

Situation

As part of Sectoral Asset Management's operations team, Gauthier Sanz is involved in various functions critical to the operational success of the funds managed by the firm. Among his key duties is investor reporting, which was one of his most time-consuming tasks before switching to InvestorVision.

Previously, each fund administrator used their own separate portal for fund reporting. This created friction for investors, requiring them to use multiple logins and credentials to access reports across their portfolios.

With upwards of 300 users logging onto various platforms to access their fund documents, the firm's three-person investor reporting team was often inundated with requests to help reset passwords and locate files. To reduce the team's administrative workload and improve the investor experience, Sanz and team decided to upgrade their portal.

Client Success Story

Sectoral Asset Management

Industry:
Public equity
and venture capital



One platform

Easy access to documents
across all funds



Bank-grade security

Granular permission controls
ensure documents reach their
intended recipients



Expert support team

Active partner in building
customized solutions



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– Gauthier Sanz
Sectoral Asset Management

Solution

Based on prior experience with other SS&C fund administration products, Sectoral initiated the switch to InvestorVision, SS&C Intralinks' end-to-end investor reporting solution. With the help of the Intralinks support team, Sectoral's operations team transferred the firm's fund data to InvestorVision, making the platform the main reporting portal for fund administrators and investors. "It's a more tailored service for our investors, and it makes the whole process easier for us," Sanz says.

By using standardized Institutional Limited Partners Association (ILPA) templates, the firm can seamlessly distribute capital account statements to investors across four active private funds and ten special-purpose vehicles.

Unlike the firm's previous file-sharing tool, InvestorVision simplifies document access with intuitive folder structures and naming conventions, making it easier for investors to find what they need. Additionally, InvestorVision's advanced data capabilities allow Sectoral Asset Management to share key performance insights and fund metrics with investors. They can also track engagement to ensure critical documents reach the right recipients.

Results

InvestorVision has transformed the operations team's workflow by significantly reducing their administrative

burden and improving reporting accuracy. The portal's granular permission controls ensure the highest level of data security. "We can send documents to specific users or investor groups, which means we don't have to worry about anything going to the wrong person," says Sanz.

What was once a time-consuming process of sharing documents across multiple portals can now be completed in one step within one platform. For Sanz, that means less time spent uploading documents and sending email attachments.

Benefits

InvestorVision has been well-received across Sectoral's internal and external user bases. "We're getting great comments from our investors and business development team," says Sanz. "We're really happy with InvestorVision." Once-frequent questions about where to find documents are now a rarity, giving investors and fund managers more time to focus on more meaningful work. "All they have to do is log into InvestorVision, and everything is right there."

The Intralinks support team has been an active partner throughout the entire onboarding process and continues to work side-by-side with Sectoral's operations team to develop new automated capabilities. "We're lucky to have this support team," he says. "Anytime I have a question, I can just send an email, and the response is really fast."

As Sectoral's investor base grows, InvestorVision will be there to help the firm scale its reporting capabilities and continue delivering a premium investor experience.



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