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CASE STUDY

BOWMARK CAPITAL

Bowmark Capital Uses SS&C Intralinks FundCentre to Improve Investor Reporting and Engagement

INDUSTRY
Private Equity

REGION
UK

Improved visibility

Gained clearer insight into investor activity and document engagement.

Streamlined reporting

Automated fund data extraction and report delivery.

Responsive support

Over 700 contacts reviewed during upgrade.

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OVERVIEW

Founded in 1997, Bowmark Capital is a London-based private equity firm focused on helping management teams build high-growth companies in the services and technology sectors. By upgrading to SS&C Intralinks FundCentre™ Reporting, the firm streamlined investor reporting with a more intuitive platform for communications, document delivery and engagement tracking.

SITUATION

While satisfied with Intralinks' legacy Fund Reporting solution, the Bowmark team was ready for a more modern platform with enhanced fund-management capabilities. Previously, information was spread across multiple exchanges, making it difficult to cross-check data and users across funds. Confirming receipt of materials such as drawdown notices, deal memoranda and investor tax statements also often required manual follow-up.

As Bowmark continued to manage investor communications across multiple funds, the team saw an opportunity to report to investors more effectively and efficiently. FundCentre Reporting provided a platform that could scale fund data and document sharing, while giving greater insight into how investors interact with fund materials.

Ensuring a seamless transition for investors was a key consideration in Bowmark Capital's selection of a new reporting platform.

"For something as important as our investor communications ... You only really get one chance to get that right."

David Walsh, Financial Controller, Bowmark Capital

After considering several solutions, Bowmark Capital chose to upgrade to FundCentre Reporting. Intralinks' strong reputation and familiarity among general partners (GPs) and limited partners (LPs) gave Bowmark confidence that the transition could be completed with minimal disruption.

SOLUTION

FundCentre Reporting, an AI-powered investor reporting platform designed to help GPs manage investor communications, allows Bowmark to distribute reports and share fund data through a single portal.

With FundCentre, the team manages recurring investor communications and reports more efficiently. Automated reporting workflows, permission controls, templates and engagement tracking capabilities help the IR team implement a more repeatable and controlled process across funds.

The Intralinks team worked closely with Bowmark to ensure a seamless transition. The process involved reviewing roughly 750 contacts, which Bowmark used as an opportunity to improve data consistency across funds.



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RESULT

For Bowmark Capital, the move to FundCentre Reporting was more than a technology upgrade. It was an opportunity to create a more organized, transparent and user-friendly reporting experience for the Bowmark team and the firm's investors.

The platform has already reduced the team's administrative burden. As the team builds templates and becomes more familiar with the upload process, Bowmark expects recurring multi-investor document uploads to become even faster over time.

Before moving to FundCentre Reporting, the team had limited visibility into investor engagement within the platform. Now, it can quickly confirm whether notifications were sent successfully, who has read them and who has been active in the system.

"The analytics that come out of FundCentre Reporting make it much easier to pinpoint issues and understand how our investors are using the system."

David Walsh, Financial Controller, Bowmark Capital

The upgrade has also made it much easier to manage contacts and investor data. The team can now view investor information in a single environment and easily match it against its customer relationship management (CRM) system, helping Bowmark Capital update records and manage fund communications with greater confidence.

LOOKING AHEAD

With FundCentre Reporting, Bowmark Capital has strengthened its investor communication process, improved visibility into investor engagement and created a more centralized workflow for managing reporting activity across funds. Building on its long-standing relationship with Intralinks, the firm is now equipped to deliver a premium investor experience at scale as its business needs evolve.

See what FundCentre AI can do for you.

CONTACT SALES

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