

## Press release

# UNION INVESTMENT, GERMANY, GOES LIVE WITH ORTEC FINANCE'S PEARL FOR PERFORMANCE MEASUREMENT, ATTRIBUTION & GIPS

Frankfurt am Main, Amsterdam, September 2020

**Union Investment, one of the most successful German fund managers, has adopted Ortec Finance's Performance Measurement, Attribution & GIPS solution PEARL for their asset management services.**

Union Investment offers investment solutions to institutional, retail & real estate clients, and manages a total volume of € 339.4 bn (as of 2020, March 31). Their pro-active investment philosophy aligns perfectly with the analytical possibilities of PEARL and hence they decided to replace their current system with PEARL.

Ortec Finance and Union Investment announce that upon earlier signing of their contract, they have commenced operational mode for PEARL. Ortec Finance's PEARL will evaluate the impact of all investment decisions for a wide variety of asset classes and instruments, bringing clarity to Union its investment process.

**Elske van de Burgt**, Managing Director Investment Performance, commented: "We were very happy Union Investment decided to partner with us. We are even more delighted that we are in full operational mode now. Our performance attribution solution allows Union Investment taking a holistic view of investments and offers great workflow and data management support along the way. Enhanced insight in the added value of investment decision-making, will enable Union Investment to monitor and improve their investment management process. This allows Union Investment to better show their clients where and how they have added value in the investment management process.

**Michaela Krahwinkel**, Manager Performance Analysis at Union Investment: "We undertook a comprehensive RFP process to select the right solution for our investment process which resulted in us selecting Ortec Finance's PEARL. The ease of use, quality of analytics and capabilities of PEARL made Ortec Finance the obvious partner for Union Investment. During implementation, we intensely collaborated so the software is configured to our specific needs

and situation. PEARL will improve the quality and transparency of our performance reporting, adding greater ability to analyse the performance and risk of our investment decisions. We are really looking forward to working with Ortec Finance and building our partnership into the future.”

– End of Release –

## **Note to Editors:**

### **About Ortec Finance**

Ortec Finance is the leading provider of technology and solutions for risk and return management. It is our purpose to enable people to manage the complexity of investment decisions. We do this through delivering leading technologies and solutions for investment decision-making to financial institutions around the world. Our strength lies in an effective combination of advanced models, innovative technology and in-depth market knowledge. This combination of skills and expertise supports investment professionals in achieving a better risk-return ratio and thus better results.

[www.ortec-finance.com](http://www.ortec-finance.com)

### **About Union Investment**

With over 60 years of experience, Union Investment's more than 3,200 employees develop and manage investment solutions for institutional and private investors. Today, Union Investment is one of the largest fund providers in Germany, with around 339.4 billion euros in client assets under management. Over 4.6 million customers entrust the fund company with assets in 1,251 funds.

[www.union-investment.com](http://www.union-investment.com)

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