



Project Profile



LOOMIS + SAYLES & COMPANY, L.P.

Loomis Sayles & Company, L.P. was founded in 1926 and has provided investment management services to individual and institutional clients for more than 75 years. Loomis Sayles & Company manages over \$50 billion in assets and offers a full range of equity, fixed income and international investment products.

Goal: Develop a flexible, web-based reporting environment to support the specific needs and workflows of the fixed income, equity and international investment teams.

As Loomis Sayles began rolling out their new trading environment, they wanted to ensure that the reporting available satisfied the workflows and provided the decision-making tools required by their investment teams. Varden's eReportal platform was chosen as the basis for the new reporting initiative. The platform was selected based on its web interface, flexibility to deliver various formats, and proven ability to develop, modify, and deploy reports very quickly to the end users. "Varden has leveraged the eReportal platform to rapidly deliver tools that our end users need. Our focus is on delivering solutions to the investment teams that provide a competitive advantage. Varden has been a key partner in achieving this goal," said John Gidman, CIO of Loomis Sayles & Company.

Many of the reports developed for Loomis Sayles & Company provide unique and advanced features including:

- On-the-fly report format selection (html, excel, pdf, crystal viewer) allows users to select the format that best suits their needs
- Real-time execution reports make direct calls to the Bloomberg API to provide current pricing and fixed income characteristic data
- Reconciliation reports retrieve data from several different database platforms and present it in one cohesive report

"The workflow and data requirements of our investment teams are constantly evolving," says Kevin McGuire, Vice President and Fixed Income Liaison. "Having the ability to quickly meet those changing demands is crucial. The reporting environment developed by Varden has become a critical component in our investment workflow. Varden's infrastructure and development expertise allows us to quickly deliver fast, sophisticated tools that are easily accessible to the end users."

Loomis Sayles & Company is focused on delivering exceptional service and responsiveness to the changing needs of their investment professionals. The combination of Varden's eReportal platform and professional services has been a winning combination in achieving this focus.

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John Gidman, Chief Information Officer
Loomis Sayles & Company
