

# SUNGARD<sup>®</sup>

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## **JO Hambro Investment Management Live with SunGard's AMBIT APSYS**

**London, UK - Jul 4, 2006** - SunGard (<http://www.sungard.com>) today announced that JO Hambro Investment Management Ltd had gone live with SunGard's Ambit Apsys (<http://www.sungard.com/apsys>) for private client wealth portfolio management, back-office settlements and client reporting.

JO Hambro Investment Management was the first pilot customer of Ambit Apsys in the UK, and took part in a comprehensive gap analysis, during an implementation that took 18 months including the roll-out and testing of large pieces of UK-specific functionality. It is one of the first SunGard customers to implement the Ambit Apsys service in the UK. Ambit Apsys is already a well-established wealth management solution in Switzerland, Liechtenstein, Luxembourg and in a number of off-shore centres.

In addition to investment and portfolio management, settlements and processing, JO Hambro will use SunGard's Ambit Apsys for management fee calculation, BACS payments, and Global Investment Reporting Standards (GIPS)-compliant performance measurement, attribution and analysis.

JO Hambro Investment Management was an existing SunGard customer, having previously used SunGard's ePAL solution for more than six years. It made the decision to migrate to Ambit Apsys following its clients' demand for access to a wider range of securities and markets, whilst maintaining the efficiencies already achieved with SunGard's outsourcing service. Ambit Apsys is highly customisable: for example, JO Hambro Investment Management is able to have client-specific booklets, and can perform its own SQL queries to the database, whilst Ambit Apsys can be fully integrated into its existing workflow. Ambit Apsys's Strategic Investment Management System provides JO Hambro with decision support, portfolio modelling and asset allocation information.

Ambit Apsys provides a platform to help private client wealth managers increase their revenues without increasing their costs. Choosing SunGard's Ambit Apsys solution helps JO Hambro to focus on its core skills of investment and client management, whilst partially outsourcing its back-office functions to an established and trusted partner in SunGard.

Andy Steel, chief operating officer at JO Hambro Investment Management, said, "We have had a long and successful relationship with SunGard, having used its ePAL solution for more than six years. This has allowed us to experience SunGard's outsourcing business model, which we value highly. Ambit Apsys will help facilitate the anticipated growth of our business through increased efficiency in all areas of the business as a result of this implementation."

Damian Powell, general manager of SunGard's AMBIT APSYS business unit, said, "Ambit Apsys is already a well-established solution for private client wealth managers in continental Europe. A number of UK customers already use SunGard technology in this space through the ePAL solution. We expect JO Hambro to be the first

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of many to migrate to Ambit Apsys's improved functionality now that it is fully compliant for the UK market in the front middle and back-office."

## **About JO Hambro Investment Management Ltd**

J O Hambro Investment Management (JOHIM) is a specialist investment house focused on the discretionary management of portfolios for private individuals and related family interests. JOHIM also manages charities and other specialist investment portfolios. The company was founded in 1986 by the Hambro family. Since then, assets under management have grown just over £3.0 billion. JOHIM is a wholly owned subsidiary of the Credit Suisse Group. In addition to individual, segregated portfolios, JOHIM manages three UK OEIC funds – the JOHIM Global, European and UK Funds – and three Dublin OEIC funds in the Waverton Investment Fund range and the Charlemagne, Pepin and Tai Chi hedge funds.

## **About Ambit Apsys**

SunGard's Ambit Apsys is a multi-lingual (German, English, French, Italian), multi-currency, multi-entity, front-to-back solution designed primarily for financial institutions to serve their private and institutional clients. The solution supports the following asset classes: Cash (accounts), Savings (accounts), Loans, Equities, Fixed Income, Futures, Options, Mortgages, Unit Trust/Mutual Funds, deposits.

Ambit Apsys is a comprehensive solution designed for banks and financial institutions primarily active in private banking and wealth management, focusing on the needs of their private or institutional clients with global and holistic service. Serving institutions from 10 to 500 and more users, Ambit Apsys offers high performance, scalability, and advanced business process and front-office functionality while maintaining low total cost of ownership. Ambit Apsys is a real-time, multi-lingual, multi-currency and multi-entity, front-to-back integrated solution operating on an open and state of the art technical environment. For more information please visit: [www.sungard.com/apsys](http://www.sungard.com/apsys)

## **About SunGard**

SunGard is one of the world's leading software and IT services companies. SunGard serves more than 25,000 customers in more than 70 countries, including the world's 25 largest financial services companies.

SunGard provides software and processing solutions for financial services, higher education and the public sector. SunGard also provides disaster recovery services, managed IT services, information availability consulting services and business continuity management software.

With annual revenue exceeding \$5 billion, SunGard is ranked 472 on the Fortune 500 and is the largest privately held business software and services company on the Forbes list of private businesses. Based on information compiled by Datamonitor\*, SunGard is the third largest provider of business applications software after Oracle and SAP. *Continuity, Insurance & Risk* has recognized SunGard as service provider of the year an unprecedented five times. For more information, please visit SunGard at [www.sungard.com](http://www.sungard.com).

\*January 2009 *Technology Vendors Financial Database Tracker* <http://www.datamonitor.com>

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