

The 2019 Global Investment Management Survey:

Understanding Industry IT Priorities and Spending

Today's Speakers



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Agenda

- Introduction
- Background and Scope of Survey
- IT is a Strategic Priority
- Who's Outsourcing & What?
- The Security Threats List
- IT Budgeting

Webinar Details

- The presentation is being recorded
- Full Survey Report will be provided post-webinar
- Follow along with us on Twitter!

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Setting the Stage: Background, Scope and Demographics

- 150 senior-level executives in US and UK
- Firms <500 employees
- Respondents have IT decision making responsibility

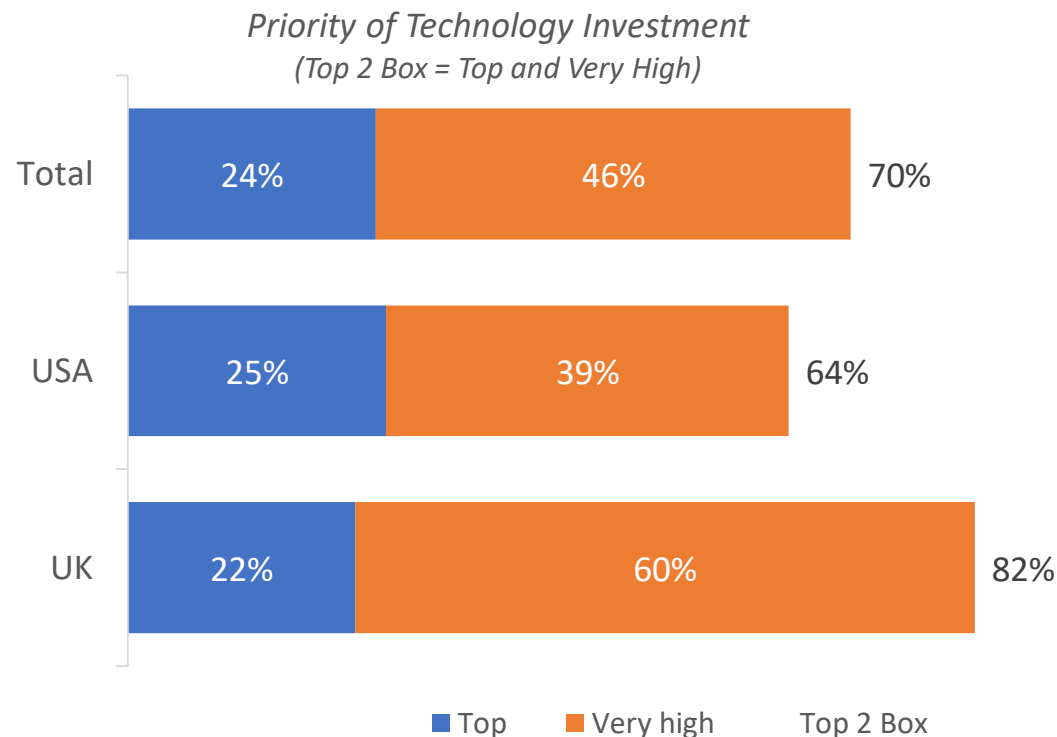
Respondent Firm Types

- 26%** Alternative Investment Firms (Hedge Funds, PE)
- 24%** Asset/Investment Management
- 21%** Investment Bank
- 18%** Investment Advisor
- 11%** Wealth Management

Respondents Assets Under Management

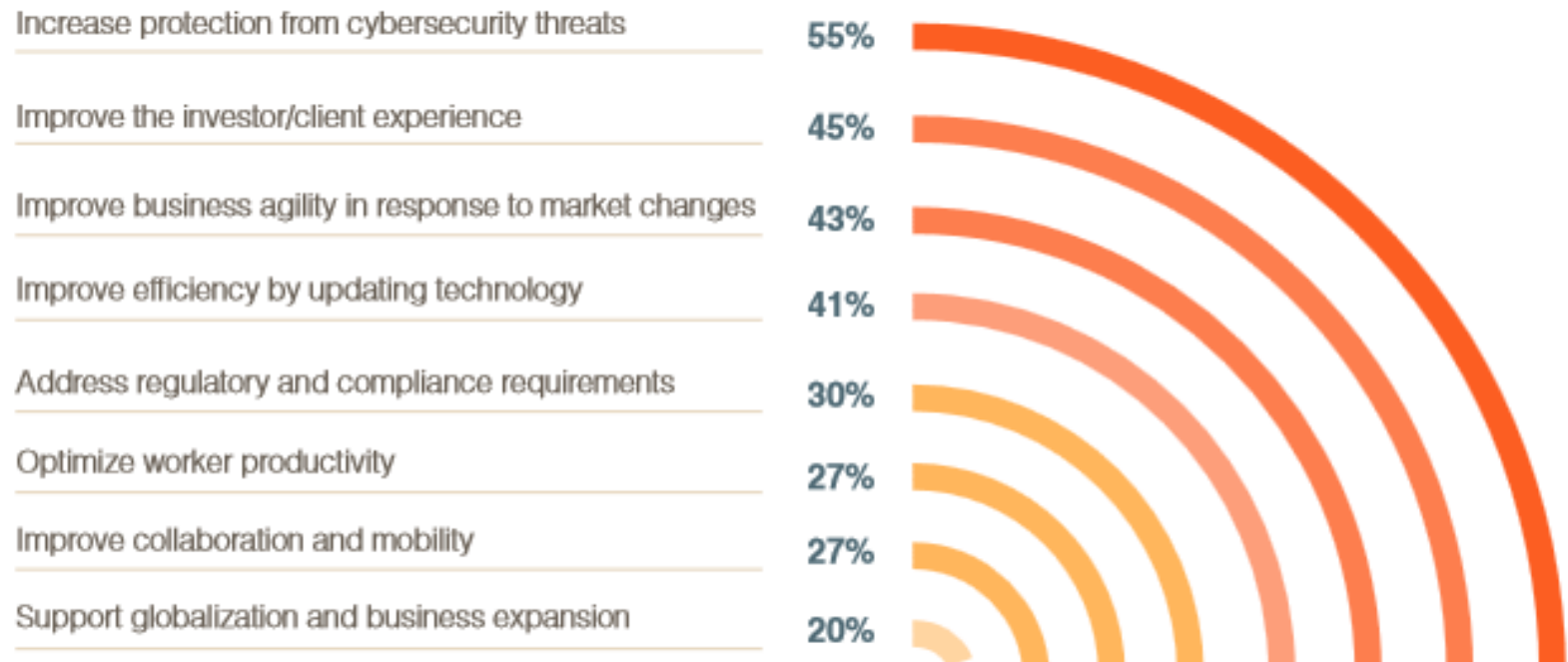
- 10%** \$2 billion or more
- 21%** \$1 billion to \$1.9 billion
- 28%** \$500 million to \$999.99 million
- 20%** \$250 million to \$499.9 million
- 20%** Under \$250 million

Technology Investment is a Top Tier Priority For Small To Mid-sized Investment Firms



Top Business Priorities Driving IT Investments

Security is the clear #1 priority. However, firms also look for customer, competitive and efficiency benefits



Technology Initiatives

	Current	Planned
Connected Clouds (Public, Private, Hybrid)	64%	26%
Managed cloud services	59%	34%
Customer-experience upgrades	50%	42%
Moving enterprise-wide middle- and back-office applications into the cloud	49%	43%
Modernizing legacy data architecture and infrastructure	45%	45%
Big data tools and visualizations	41%	46%
Disruptive tech (e.g., AI, Blockchain)	31%	50%
RegTech	27%	44%

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In 2019, Cloud is Inevitable



Public Cloud

Delivering agility, scalability and flexibility to your business



Private Cloud

Public cloud benefits, with dedicated infrastructure and greater control



Hybrid Cloud

Blending on-premise, private, public or multi-cloud environments for a custom solution

Ultimately You Want ...

A single, secure and seamless solution on any cloud path
your firm selects

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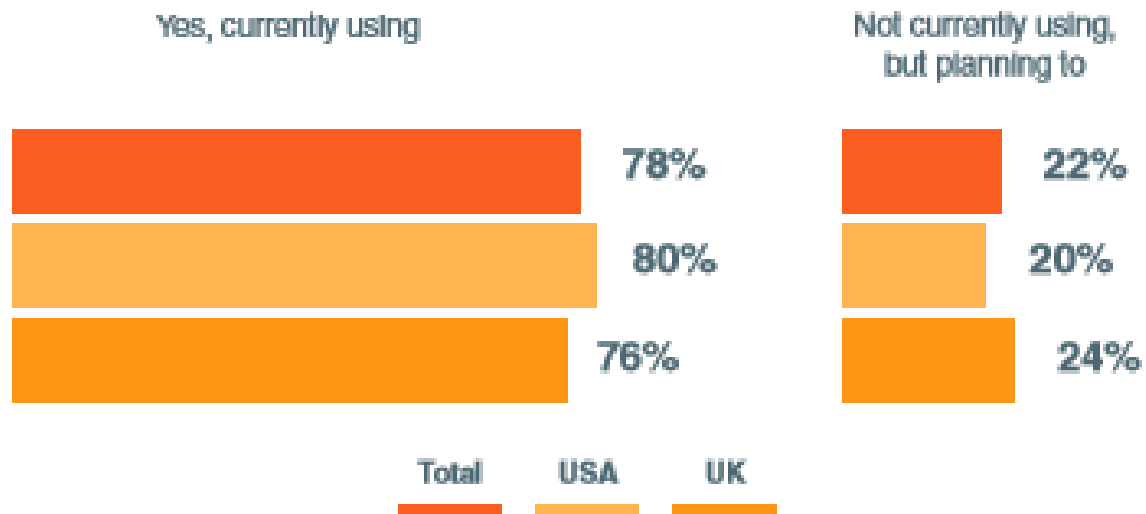
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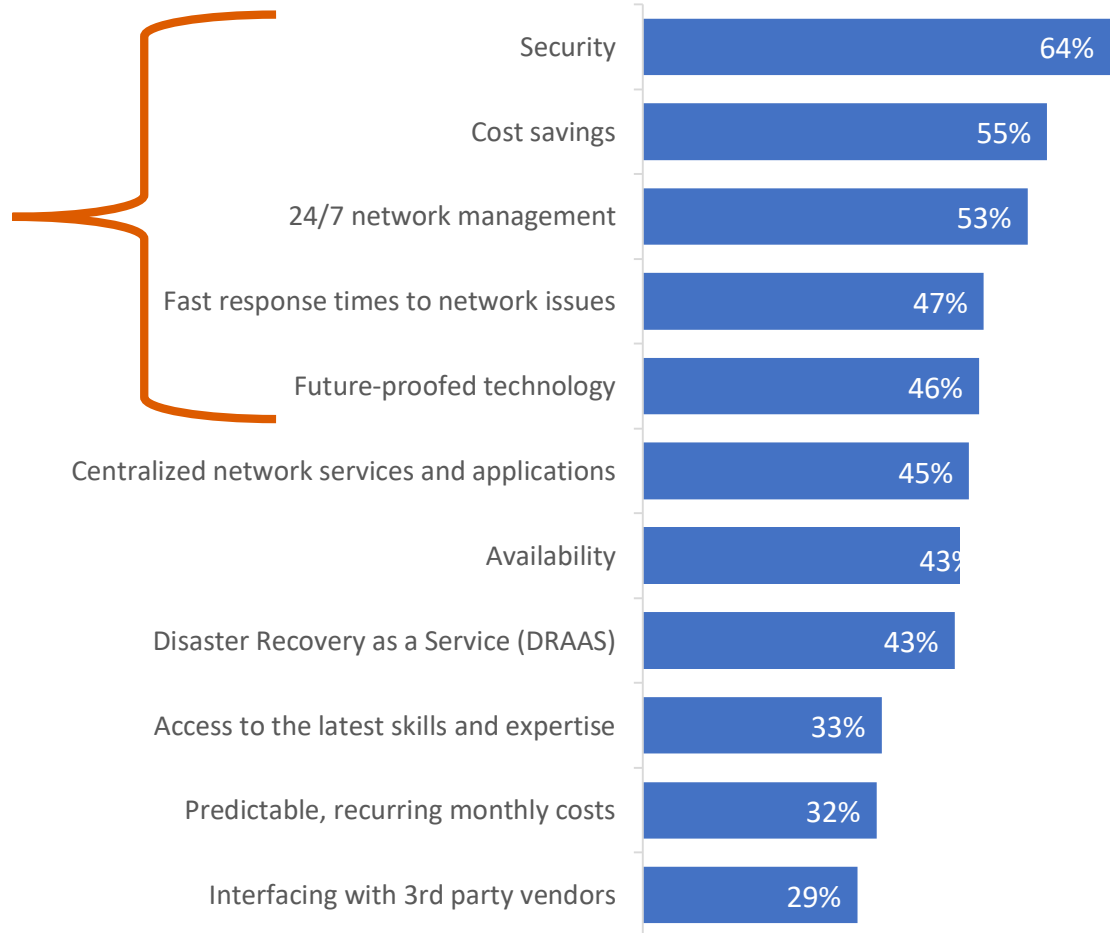
Managed Cloud and Outsourced IT Service Dominate the Sector

Use Managed Cloud and/or Outsourced IT Providers

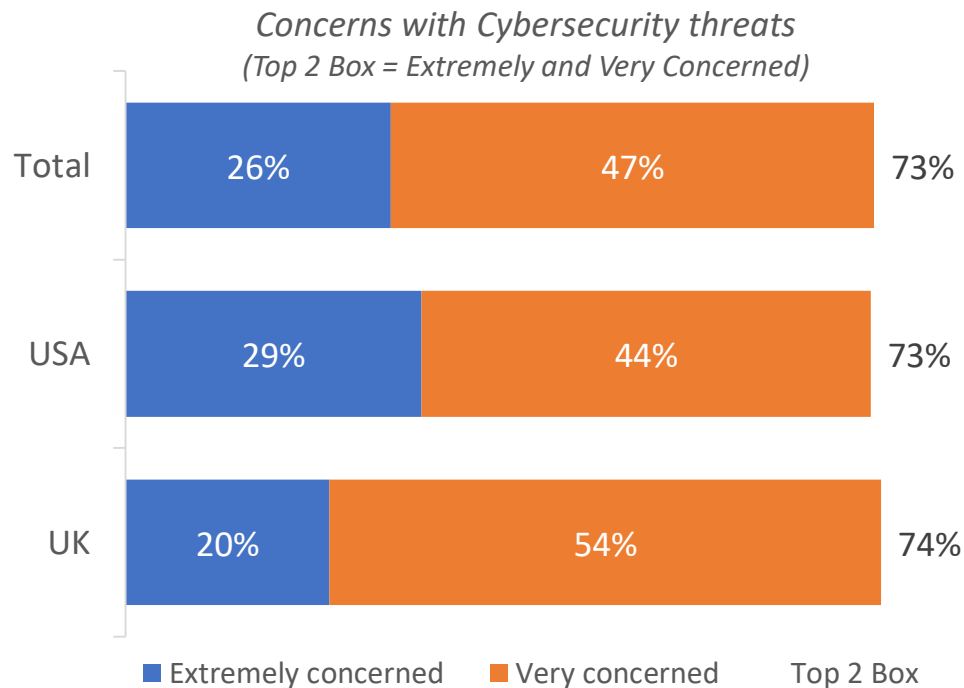


Top 5 Benefits of Using Managed Cloud and/or Outsourced IT

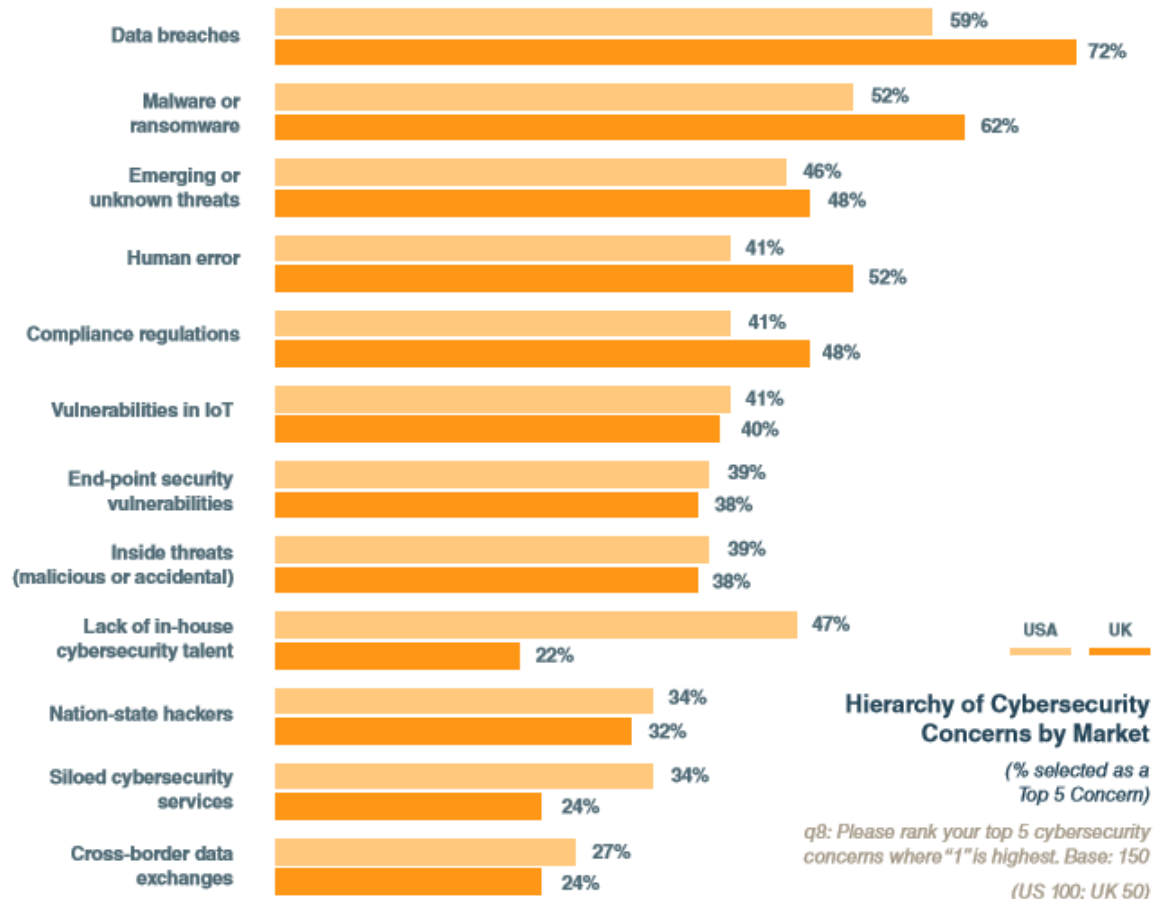
- Improved data security
- Cost savings
- 24/7/365 support and network management
- Rapid response time
- Future-proofed tech
- Centralized network and app management



The US and UK share similar levels of concern with cyber threats



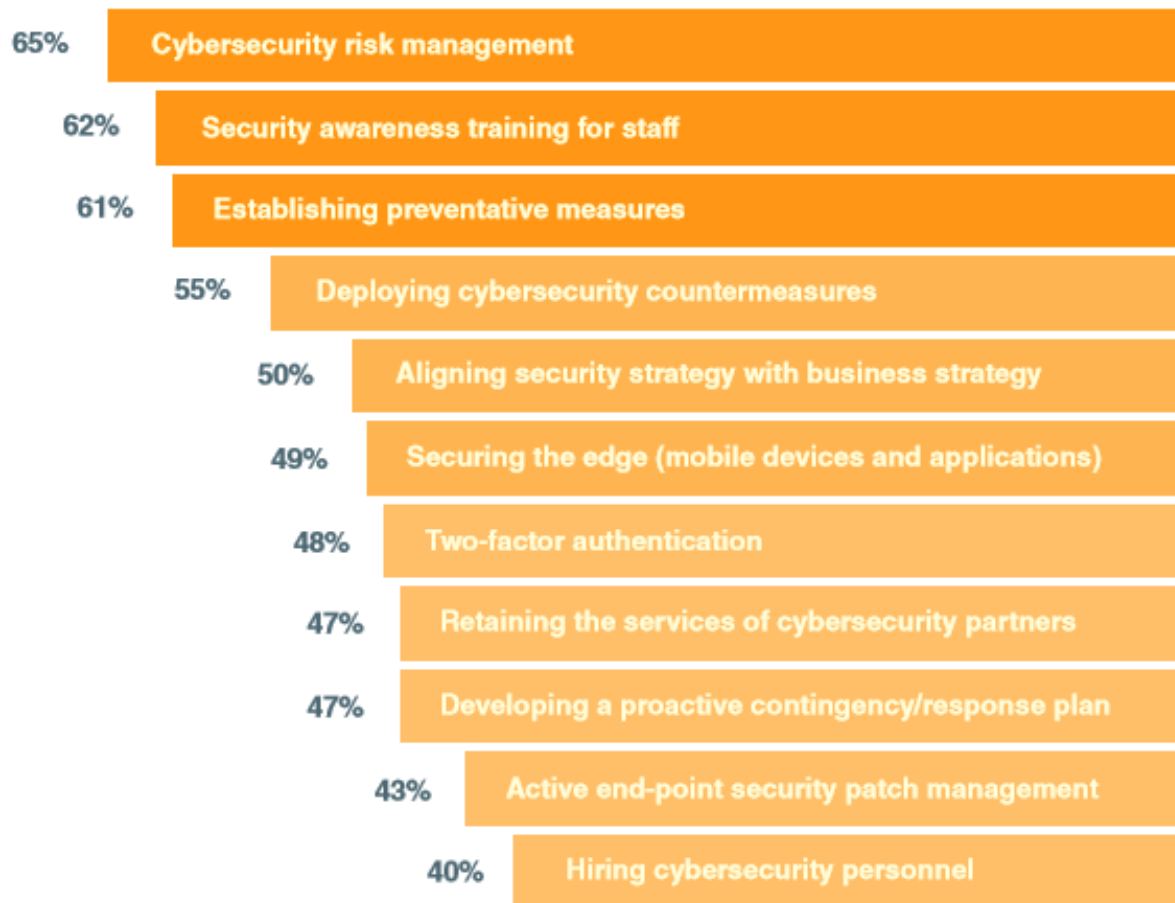
Data Security Threats are a Major Concern



Moving Targets: Today's Threats



Investment Firms are Developing Robust Data Security Programs

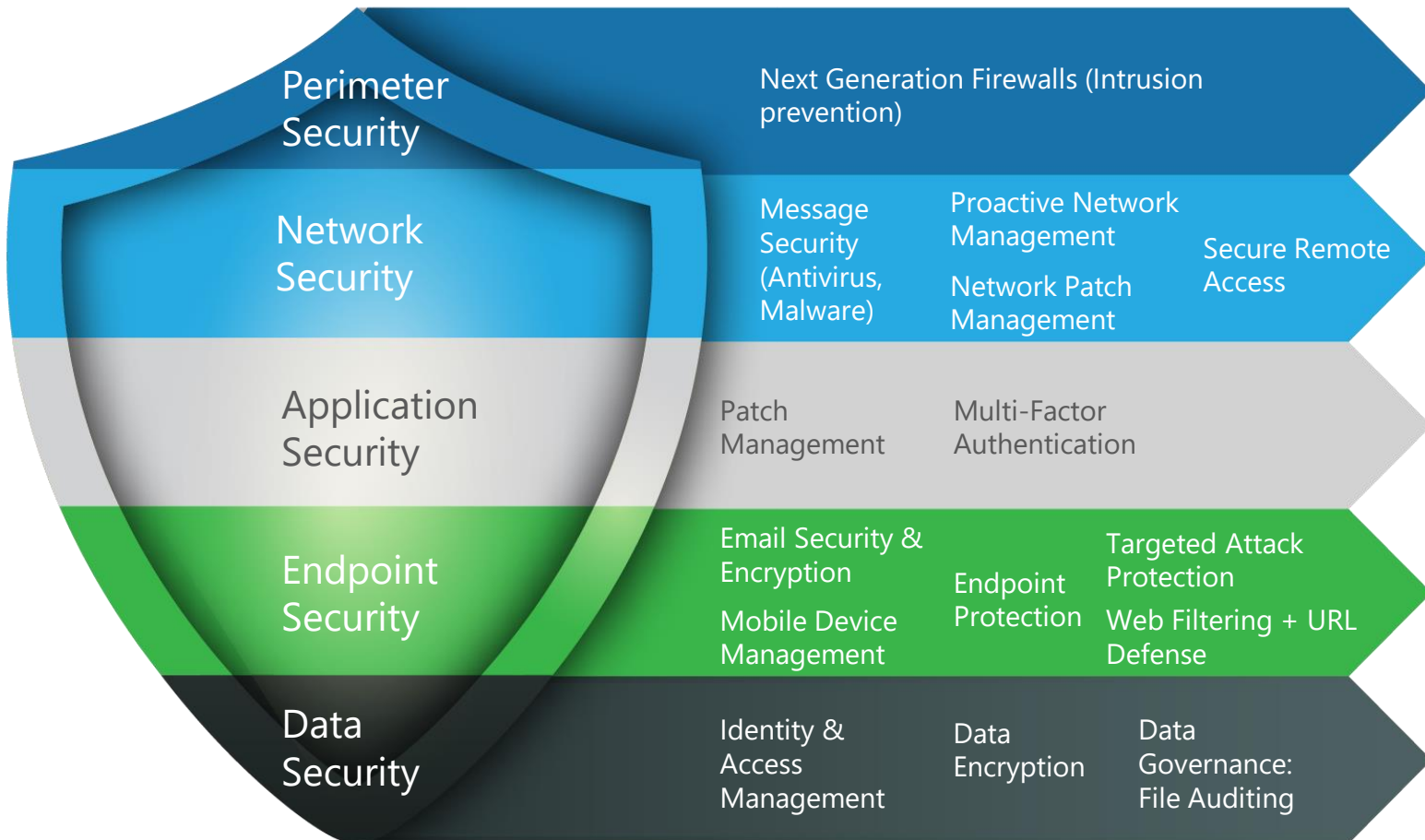


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A Layered Approach to Cybersecurity



A Single Cybersecurity Partner, or Multiple?

Preferred Cybersecurity Partner



What are Firms Outsourcing?

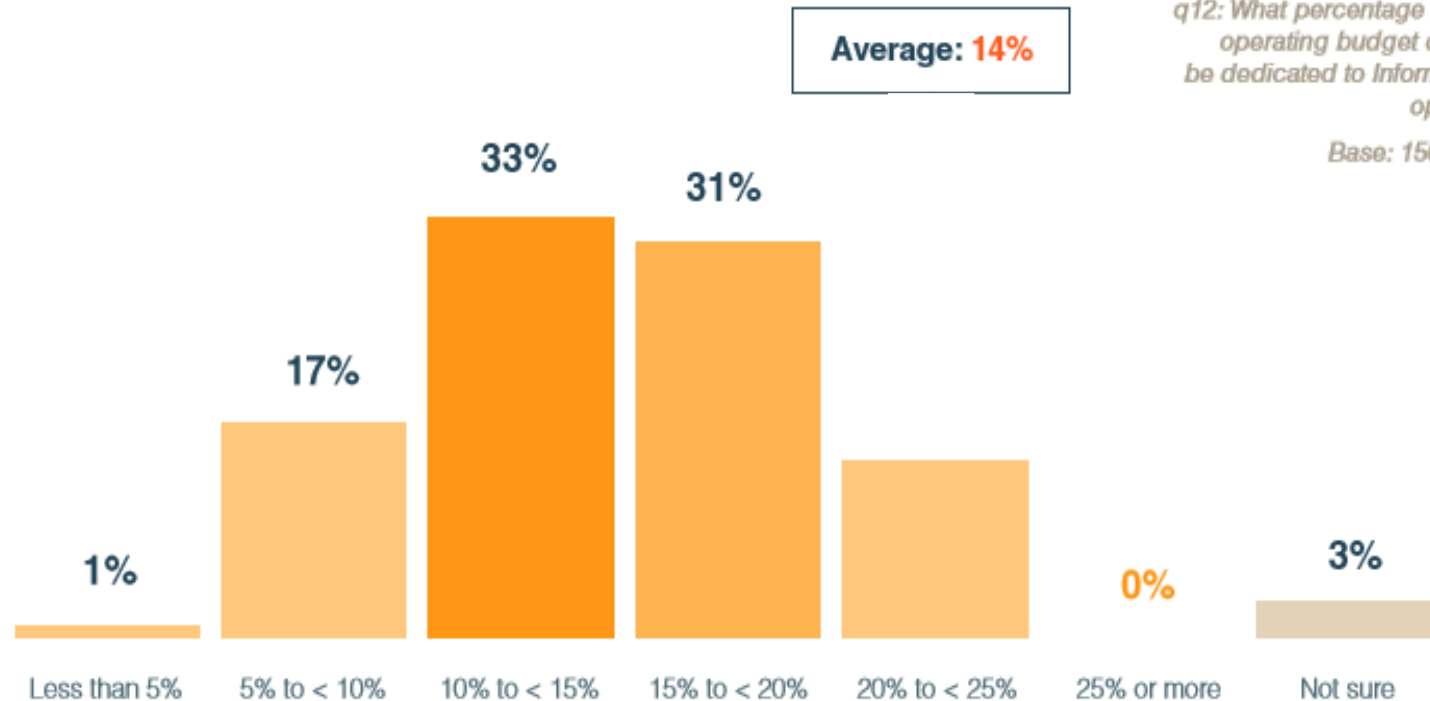
- Security Monitoring
- Security testing
 - Vulnerability assessments
 - Pen testing
- Threat Intelligence
- Security Training

IT Operations Budget in 2019

Average % of Total Operating Budget Dedicated to IT OPS

q12: What percentage of your firm's total operating budget do you expect will be dedicated to Information Technology operations in 2019?

Base: 150 (US 100; UK 50)

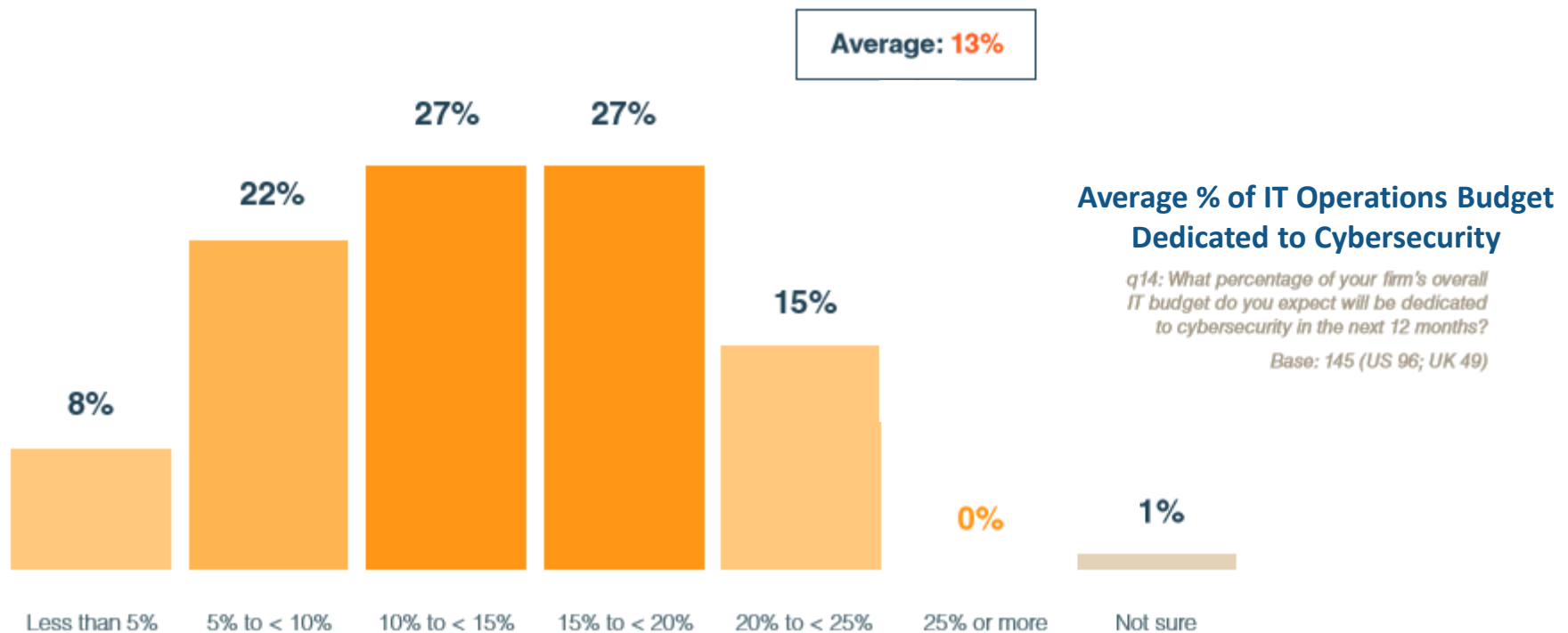


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Data Security: the Highest Budgetary Priority in IT Ops



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Final Thoughts

- Data security is still an area of great concern, and firms are demonstrating that in their budgets and overall priorities
- Cloud adoption and outsourcing continue to rise
- Most firms outsource some IT function, and those that don't, plan to



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 Microsoft
Tier 1 Cloud Service Provider

Thank You

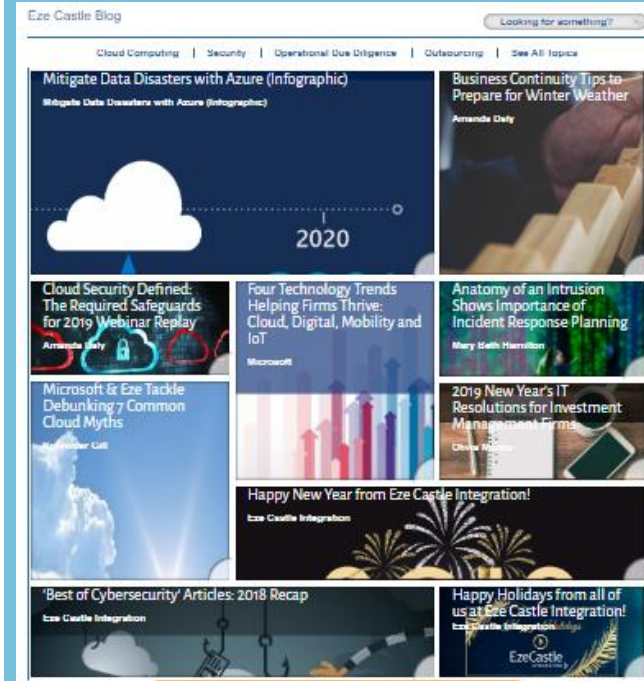


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