



How Amundi uses Symphony

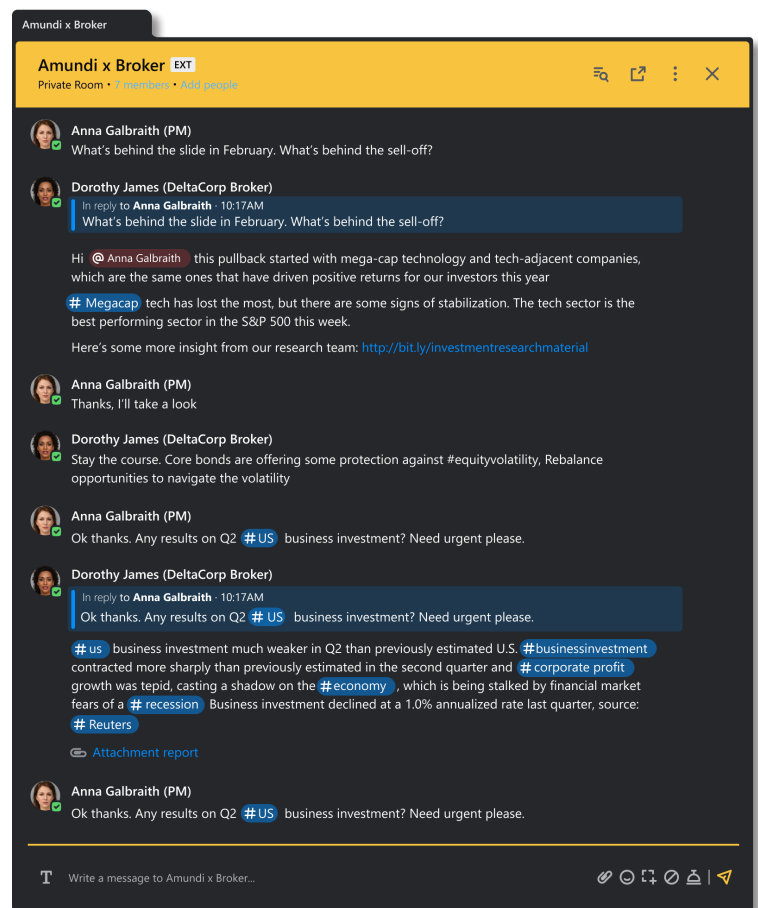
Amundi is Europe’s largest asset manager by assets under management and ranks in the top 10 globally. Amundi manages 1.7 trillion euros of assets across six main investment hubs.

Who uses Symphony at Amundi today?

We have more than 500 employees on Symphony for both internal and external use. In the Front Office, our Portfolio Managers, Analysts, Research teams, and Trading Desks use Symphony. In the Middle Office, our Trade Processing, Portfolio Administration, and Data Management teams use Symphony.

“Symphony is used more and more by the market. The platform helps us to communicate smoothly and efficiently with our counterparties, clients and partners.

Project Manager, Amundi Technology



Example of Amundi external Symphony chat room

Can you describe some Symphony use cases at Amundi?

At Amundi, the two most common use cases are internal and external Symphony chat rooms.

Internally we use Symphony extensively for team chat rooms. Amundi is a global international company with teams spread around the world and due to the COVID crisis, we have many people working at home. Symphony is an excellent way to stay connected in both cases.

Internally our most frequently used Symphony chat rooms are those between Amundi:

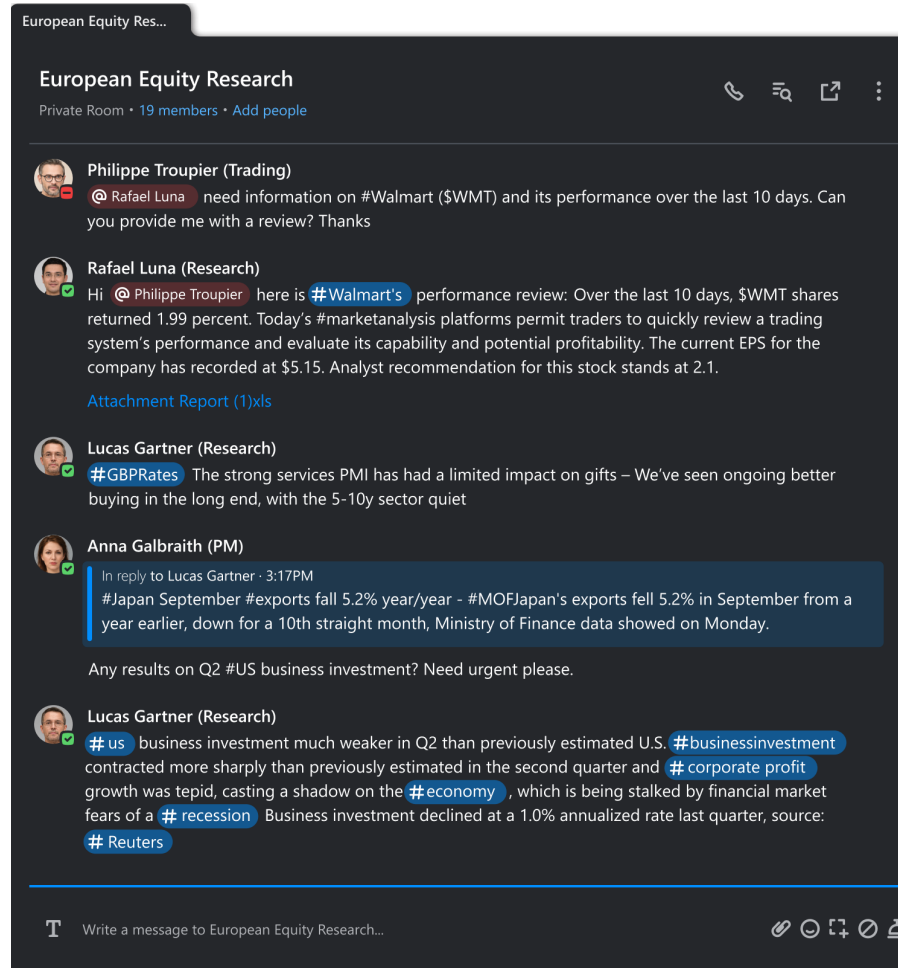
- Portfolio Managers, Analysts, and Research teams
- Portfolio Managers and Trading Desks
- Support chat rooms between business teams and IT

Externally our most frequently used Symphony chat rooms are between:

- Amundi and sell side dealer teams
- External Portfolio Managers that are clients of Amundi Technology, with Amundi Trading Desks, Middle Office and Support
- Amundi Middle Office Trade Processing teams and their corresponding sell side Middle Office teams
- Amundi Middle Office Portfolio Administration teams and their Back Offices at our Custodians or Fund Administrators

“ When we started using Symphony, we were very quickly able to create chat rooms and share a lot of information. Very positive feedback from my team. I was amazed by Symphony.

Portfolio Manager, Head of Equities, France



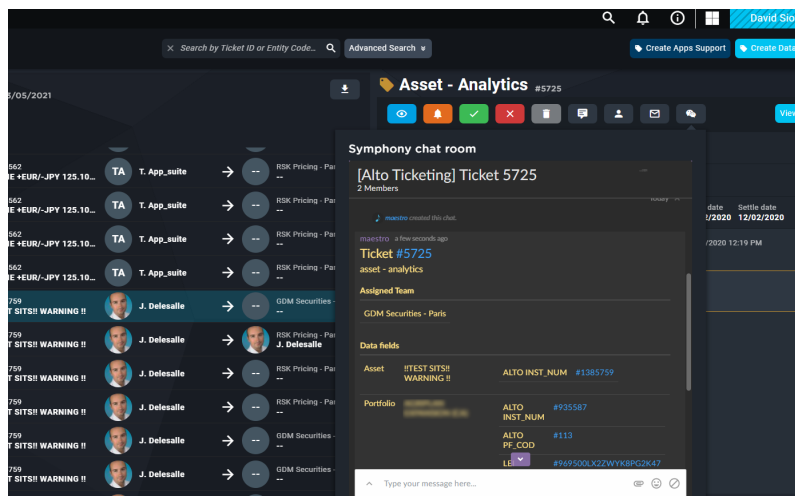
Example of Amundi internal Symphony chat room

“ I have emails, Bloomberg, LinkedIn, Skype, other internal tools... but Symphony is the central one where I can speak to counterparts but also access all information I need.

Portfolio Manager, Emerging Markets, London

Do you have any bots running on Symphony and can you describe the workflows they are improving?

We use a bot inside our ALTO* investment platform ticketing application. The bot addresses any data issues inside the ALTO platform, shares the information across all business lines and accelerates the resolution. The bot automatically creates a Symphony chat room within ALTO connecting all the ticket details, the user who reported the issue and the resolution team.



The ALTO ticketing platform with Symphony chat room

What would you say to other asset managers not utilizing Symphony yet?

Symphony is much more than a chat system and can be leveraged beyond “simple collaboration”. Security is critical for our business and, Symphony is best in class in this domain. It’s also an open platform with quality APIs so we can quickly develop bots to automate our processes and facilitate valuable integrations between our internal information system and its applications.

About Symphony

Symphony is a secure, scalable collaboration platform built specifically for financial services to meet their precise needs for data security and compliance, open architecture, and real-time cross-company communication. We’ve established the world’s largest, and most trusted financial services collaboration community. This human network combined with automation and integrations provides market participants with a common, standardized connection across people, systems, and information to bridge and accelerate workflows between them. We’re building solutions to common industry and specific market problems across the enterprise and financial transaction workflows, and innovative ways to engage and service clients securely.

* Amundi Leading Technologies & Operations (ALTO)

ALTO Investment is a Portfolio Management System (PMS) available in a cloud mode covering the entire Asset Management value chain for a large number of investment strategies and providing a 360° portfolio view for all asset classes. ALTO is offered by Amundi Technology to asset managers, insurance company, wealth management, distributors and can be enhanced with services for dealing, middle office and data management.

Do you have ideas for bots you haven’t implemented yet?

Yes. We have a project to implement a Research Bot to automate Analyst and Research content publication from ALTO Investment Research to chat rooms with PMs and Analyst teams.

We also have some ongoing discussions between Amundi Middle Office teams and our Back Offices for a bot to automate and streamline communication around workflows exceptions such as cash or stock reconciliation breaks, trade settlement issues, etc.

“Symphony makes our work more dynamic. It helps us work with our colleagues in Madrid, Munich, Milan, etc. But most importantly, a platform like Symphony makes work more enjoyable.”

**Portfolio Manager,
Head of Multi Assets, Austria**