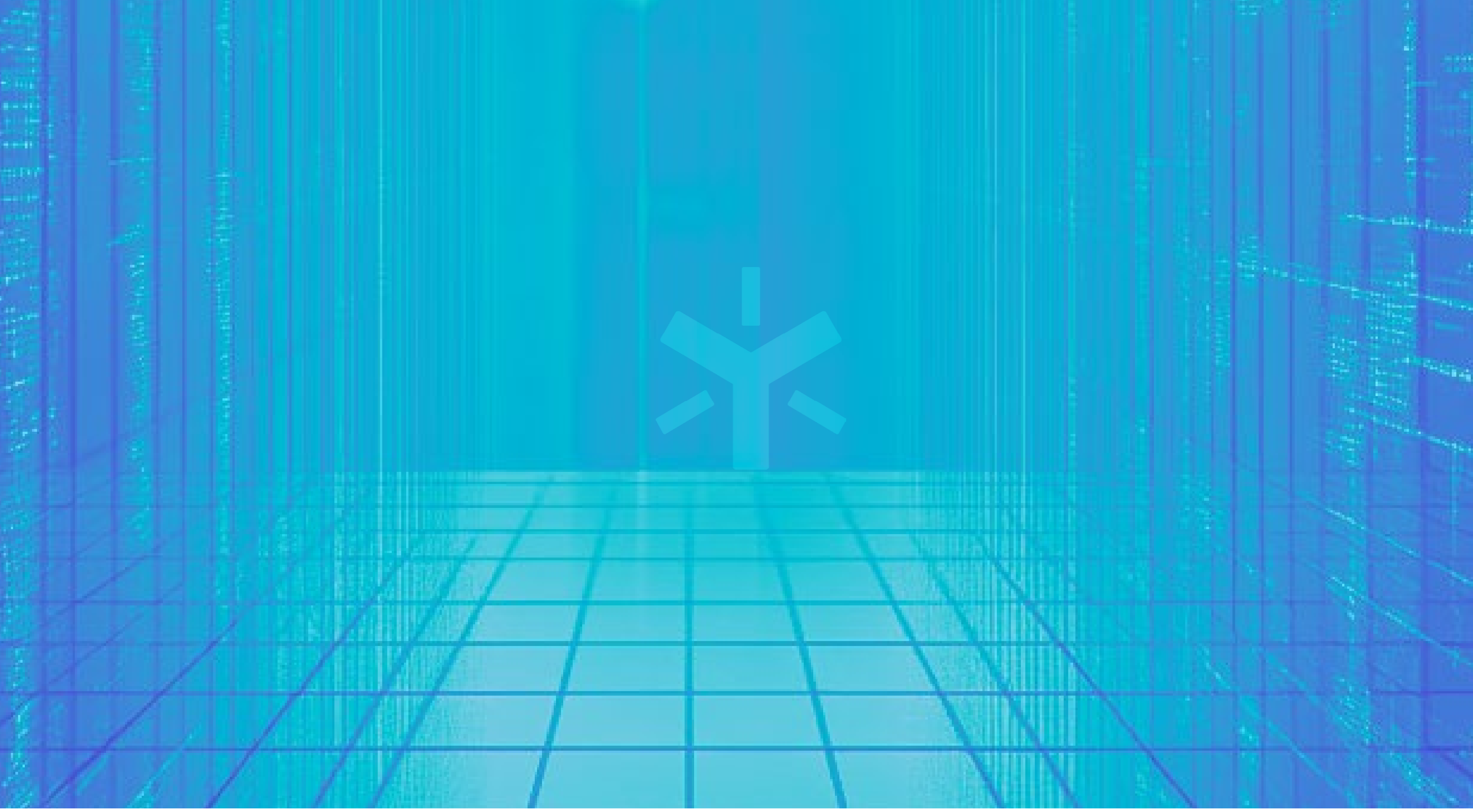

# Seven Cloud Architecture Nightmares of Buy-Side Firms

## And How Egnyte Solves Them



# Introduction

Buy-side firms, including private equity (PE), venture capital (VC) hedge funds, investment managers, and real estate investment trusts (REITs), operate in high-pressure environments where efficiency, precision, and security are paramount. However, many firms rely on outdated or poorly integrated cloud architectures that hinder their workflows. From broken file links to frustrating permission issues and limited macro compatibility, the challenges of inadequate document management systems cost firms time, productivity, and even deal opportunities.

This white paper outlines the seven most common cloud architecture nightmares faced by buy-side firms and then shows you how Egnyte's content cloud offers a reliable, flexible, and centralized platform to eliminate these challenges and drive success.

# Seven Cloud Architecture Nightmares

## 1 Broken Reference Links In Files

Due diligence, deal execution, and investment management documents such as term sheets, valuations, portfolio analyses, and financial models often rely on embedded reference links to Excel sheets or other documents. With fragmented cloud systems, these links often break when files are moved, renamed, or accessed from different devices.

Broken reference links result in lost productivity as users manually search for missing references, frustration among deal teams and external stakeholders, and delays in critical decisions.

## 2 Data Sprawl And Version Control Issues From Offline Access

To support travel-heavy schedules, users frequently download files to their personal devices for offline access. This leads to multiple file versions stored locally, often not synced back to the cloud. Even if files are saved back to a central drive, there's a risk of overwriting changes made by another user in the interim. These challenges make it hard for teams to maintain a single source of truth.

Data sprawl and version control issues not only waste time as teams reconcile multiple file versions, they also magnify the larger issue of maintaining control and visibility into the access and sharing of sensitive data.

## 3 VPN And File Latency Issues

Traditional VPNs are often required to access on-premises or hybrid cloud systems. These VPNs are prone to connectivity issues, performance bottlenecks, and security vulnerabilities—especially for the remote, often global, teams of buy-side firms.

The result is frustrated users who can't access critical files on demand, delayed deal execution, and reduced employee satisfaction and engagement.

## 4 Lack Of Document Coediting Capabilities

Buy-side firms rely on collaboration between investment teams, legal advisors, and portfolio companies. Traditional file systems often don't support real-time coediting—teams must work sequentially, resulting in inefficiency and errors.

The lack of coediting capabilities slows the turnaround of deal-critical documents and increases the potential for misalignment among stakeholders.

## 5 Inability To Change Subfolder Permissions Without Modifying Parent Folder Permissions

Flexible permissions are critical when firms need to make sensitive information accessible to select users without overexposing parent folder contents. But traditional file systems often don't support modifying subfolder permissions independently, which creates the risk of data overexposure, leads to compliance issues, makes permission workarounds complex and time-consuming, and increases frustration for IT teams and end users.

## 6 Incompatibility With Macros In Complex Spreadsheets

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## 7 Unauthorized Workarounds (Shadow IT)

All these challenges compound to create a frustrating experience that leads users to create their own workarounds. While these shadow IT systems and processes are done with the best of intentions, they hinder collaboration, delay decision making, and increase security and compliance risk. They also strain relationships between deal teams and IT.

## The Egnyte Solution:

# A Centralized Content Cloud for Buy-Side Firms

Egnyte's content cloud is purpose-built to eliminate the inefficiencies of on-premises and traditional cloud architectures while enabling secure, scalable, and productive workflows that work where and how buy-side firms do.

## 1 Centralized File Structure With Stable Reference Links

Egnyte maintains a centralized file structure that ensures reference links remain intact even as files are moved or renamed. This structure simplifies file organization and access, eliminates broken links and the need for time-consuming file searches, and supports seamless collaboration across teams.

## 2 Real-Time Sync To Prevent Data Sprawl

Egnyte automatically syncs offline files to the cloud once users regain connectivity. Built-in version control ensures teams are always working on the latest version of every document, and user and central dashboard alerts surface potential duplicates before issues arise. Real-time sync with Egnyte eliminates the risk of data sprawl and duplicate files, maintains a single source of truth for all documents, and saves time reconciling file versions.

## 3 No VPN Required

Egnyte allows users to securely access files from anywhere on any device without a VPN, even in hybrid cloud deployments. Advanced encryption and authentication protocols bolster security while smart file caching and data residency enable faster access to critical files, improving user experience and satisfaction.

## 4 Advanced Coediting Capabilities

Egnyte natively integrates with tools like Microsoft Office 365 and Google Workspace to enable real-time document coediting to accelerate collaboration and deal execution, reduce errors caused by version mismatches, and streamline workflows for investment and legal teams.

## 5 Granular Permissions at Every Level

Egnyte's permission settings allow IT admins and power users, with proper permissions, to assign granular access to subfolders without impacting parent folder settings. This improves data security and compliance, simplifies permission management for IT teams, and offers greater flexibility for end users.

## 6 Full Macro Compatibility

Egnyte supports macro-enabled files, allowing investment teams to work with complex spreadsheets seamlessly. This ensures full functionality of macro-enabled spreadsheets without losing connection with the cloud, reduces the need for manual workarounds or local-only file access, and improves productivity for financial modeling and decision-making teams.

## 7 A Unified Platform for Productivity and Security

Egnyte's all-in-one platform eliminates the need for shadow IT and promotes a seamless user experience across devices and teams. Egnyte accelerates decision-making and deal execution, reduces frustration caused by inefficient systems, mitigates security risk, and simplifies compliance.

It's just part of what led Robert Sciaraffo, managing director of technology at The Riverside Company to say, **"Pulling files and folders into a single cloud platform—one that we can easily control—has created efficiency gains for our global team."**

# Redefining Efficiency and Security for Buy-Side Firms with Egnyte

For buy-side firms, every inefficiency in cloud architecture translates into lost time, reduced productivity, and missed opportunities. Egnyte's content cloud addresses these challenges head-on, providing a centralized, secure, and collaborative platform that empowers teams to work smarter, faster, and more securely.

With Egnyte, firms can eliminate the nightmares of broken reference links, data sprawl, macro incompatibilities, and complex permissions, allowing deal teams to focus on what matters most: driving investment success.

**Ready to end your cloud architecture nightmares? Schedule a demo to see why over 2,200 financial services organizations, including 375+ buy-side firms, choose Egnyte.**



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