

MOSAICRM SOFTWARE

FASTER, SAFER FUNDAMENTAL RESEARCH

MAXIMIZE THE VALUE OF YOUR PROPRIETARY RESEARCH

MosaicRM Software is a platform for fund managers to help them streamline their internal proprietary research capabilities. The platform spans the investment, compliance, and finance/operations teams, and allows clients to focus on their highest impact areas. The result: our clients can quickly improve their proprietary research systems and do faster, safer fundamental research.

PLATFORM BENEFITS

For the *Investment team*, streamline idea generation and collaboration

- Track idea generation and due diligence efforts, without analyst data entry
- Capture information from more sources, process faster
- Increase collaboration while reducing email overload

For the *Compliance team*, consolidate research-related information into one place

- Save time with easier approvals
- Improve record-keeping and reporting by tracking emails and meetings
- Better leverage your compliance headcount

For the *Finance/Operations team*, effortlessly manage contracts, payments, and documents

- Manage contracts and subscriptions more accurately and efficiently
- Improve payment accuracy with vendors and brokers
- Customized approval processes reduce back-and-forth communications

ABOUT MOSAICRM SOFTWARE

MosaicRM Software is a subsidiary of Mosaic Research Management, a provider of technology, customized recruiting services, and proprietary data subscriptions to fund managers who value fundamental research. Clients value our best of breed technology, our flexible implementation options, and our company-wide reach.

CONTACT INFO@MOSAICRM.COM TO GET STARTED

