

Case Study

Gresham House Ireland Automates Performance Reporting with HUB

Customer Profile:

Gresham House Ireland is a specialist investment manager which aims to protect wealth and deliver financial returns for institutional and private clients through investments in public equities, real estate and forestry.

With increasing fund complexity, Gresham House saw an opportunity to improve the frequency and personalization of performance reports to their investors.

The Solution: HUB Performance Reporting

Gresham House selected HUB Performance Reporting, a SaaS solution that automates and governs reporting workflows:

- Onboarded and standardized performance data across all internal and external sources including investor share registers, transactions, and positions
- Implemented complex custom calculations and logic with exceptions flagged automatically
- Automated report production for fund and investor level reporting

The solution demonstrated HUB's ability to handle Gresham House Ireland's reporting needs with flexibility, speed, and precision.

The Outcome

Gresham House successfully transitioned from manual, quarterly reporting to a governed, automated process. Key benefits included:

- Improved accuracy and consistency in performance metrics
- Faster reporting cycles, reducing time-to-delivery
- Standardized factsheet generation and ability to meet custom reporting requirements with ease
- Enhanced auditability and governance across reporting workflows

Implementation Highlights

- **Zero-cost PoV:** Delivered under NDA with full onboarding support
- **Rapid deployment:** HUB's modular SaaS enabled fast configuration and delivery
- **Simple & Straightforward Commercials**

"HUB will improve the way we produce our performance reports and investor reporting. By automating key workflows, we significantly reduce the time required to deliver accurate and timely reports to our clients, and we're confident their solution will support us as we continue to grow."

John Brennan, COO of Gresham House Ireland

HUB offers a suite of modular, cost-effective SaaS products that can be deployed in 4 weeks, improving productivity, data accuracy and control. We offer fast implementation, easy onboarding, and straightforward commercial terms.

Join other leading asset managers and hedge funds that trust HUB. Contact sales@hub.com to schedule your demo.