

## iPM Client Profile – Bailard

Bailard is now live with INDATA's iPM – Intelligent Portfolio Management® platform, utilizing the system on a front to back office basis for its investment operations.

# Bailard

INVESTING. REDEFINED.®

Bailard, based in Foster City, CA, proudly serves institutional and private clients nationwide with innovative, intelligently designed investment products. In its pursuit of investment excellence, Bailard applies its experience and passion for innovation to deliver both traditional and specialty investment strategies. Bailard takes pride in its strong history of client satisfaction, with some client relationships spanning four generations

Bailard manages approximately \$2 Billion in assets for institutions and private clients and has a global, multi-asset approach. The firm decided to upgrade to iPM to streamline the interaction between front and back office, while enhancing the portfolio management process.

“By having iPM on top of everything related to our data, we are better able to focus on managing our investments and servicing clients,” said Sonya Thadhani, Chief Investment Officer, Bailard.

“With iPM, we are better able to focus on managing our investments and servicing clients.”

Sonya Thadhani, Bailard

### About INDATA iPM

INDATA iPM– Intelligent Portfolio Management® is a platform and set of technologies for buy-side firms that allow end users to collaborate in real-time across the enterprise. iPM is designed to increase end user productivity, enhance the investment process and offers real-time risk, compliance and performance monitoring as well as integrated tools for marketing.

For further information on how iPM can help your firm contact INDATA marketing at [www.indataipm.com](http://www.indataipm.com)