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Quest Asset Partners selects Iress to automate and simplify portfolio management

Iress today announced that Quest Asset Partners has selected Iress' Portfolio System to support greater efficiency and transparency in its approach to portfolio management.

Established in 2004, Quest specialises in high-conviction Australian equity funds, with clients ranging from large institutions to sophisticated investors. The launch of a fourth fund in May - a new long/short fund - introduced the need for a more scalable solution to its operations and in the management of portfolios.

Quest Asset Partners founding director, Chris Cahill, said: "We've been a client of Iress' trading and market data software since we started the firm, however we are now well into our second decade as a business. We wished to raise the bar with a more comprehensive solution than our current processes for managing portfolios. We needed to automate our compliance function and take the risks associated with human error out of the process as much as possible. Iress' Portfolio System has delivered that for us.

"The Iress team has been very responsive and patient in helping us get up and running in the best way possible. Despite the restrictions of COVID-19 we were able to fully implement the system, and conduct team training, while operating remotely. It's been a great experience."

Iress' Portfolio System helps fund managers with everything from simple portfolios to multi-currency, multi-asset offerings. It makes it easy to construct, review, analyse and configure client portfolios while staying across administration, performance analysis, tax impacts and risk controls. The seamless integration with Iress' Order System also means fund managers have all the tools at our fingertips to simply and easily manage the end-to-end investment process for clients.

Iress' managing director of financial markets for Australia and New Zealand, Kirsty Gross, said: "We're delighted to strengthen our partnership with Quest Asset Partners as a highly respected name in the funds management industry. We've been pleased to help them achieve enhanced operational efficiency and stronger compliance and risk management."

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About Iress

Iress (IRE.ASX) is a technology company providing software to the financial services industry.

We provide software and services for trading & market data, financial advice, investment management, mortgages, superannuation, life & pensions and data intelligence.

Our software is used by more than 9,000 businesses and 500,000 users globally. We have over 2,000 people based in Asia-Pacific, North America, Africa, the UK and Europe.

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