

**Media Release** 13 December 2021

# Optar Capital selects Iress for end-to-end portfolio management

Iress today announced that Optar Capital has selected Iress' Portfolio System to support greater operational efficiency and scalability in its approach to portfolio management. Optar Capital was founded in 2015 by partners who have more than 20 years' experience in Australian equities portfolios.

Iress' head of buy-side, Patrick Tompsett, said: "Managing portfolios can be challenging, with high demands on managers and their teams to construct portfolios as efficiently as possible. We're delighted to support the Optar Capital team to streamline its portfolio management processes, strengthen risk management and enhance accessibility through technology."

Optar Capital director & analyst, Oliver Ansted, said: "Iress' Portfolio System has been instrumental in enhancing our portfolio management process. It provides a comprehensive solution for our team to manage our accounts, trade, and view market data all in one place, which has brought more transparency and efficiency to our workflow."

"Through Iress' Portfolio System, we have also been able to automate our compliance processes and increase our connectivity with brokers. The system is flexible and user-friendly, and the Iress team has been very supportive in helping us to implement the system and get the most out of it."

Iress' Portfolio System helps fund managers with end-to-end portfolio management support, from simple portfolios to multi-currency, multi-asset offerings. Through Iress' Portfolio System, fund managers can construct, review, analyse and configure client portfolios, report on tax, analyse valuation and performance and access approved product lists. The integration with Iress' Order System also means fund managers have the tools they need to manage the end-to-end investment process for clients.

For more information on Iress' Portfolio System, visit:

<https://www.iress.com/software/investment-management/portfolio-system/>.

## Ends

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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 10,000 businesses and 500,000 users globally. We have over 2,250 people based in Asia-Pacific, North America, Africa, the UK and Europe.

[www.iress.com](http://www.iress.com)

## About Optar Capital

Optar Capital is a fully independent High Conviction Australian Equities Manager for institutional clients. Optar Capital's portfolio managers have more than 10 years' experience managing large scale concentrated portfolios with a strong track record and a proven ability to manage liquidity.

<https://www.optarcapital.com/>