

SFS Turns Obligation Into Opportunity Using Intermediary DSA/DSP Data For Distribution Insights And Strategic Advantage

LARKSPUR, CALIFORNIA, UNITED STATES, November 7, 2023
/EINPresswire.com/ -- Contact:
Nicole Callies
Director of Business Development
414.795.6956
ncallies@sfsmars.com
www.sfsmars.com



SFS TURNS OBLIGATION INTO OPPORTUNITY LEVERAGING INTERMEDIARY DSA/DSP DATA FOR DISTRIBUTION INSIGHTS AND STRATEGIC ADVANTAGE

SFS, a fintech leader in sales reporting and data analytics for the asset management industry, announces a solution for asset management firms now required to receive financial intermediary Direct Shareholder Activity (DSA) and Direct Shareholder Position (DSP) files via Omni/SERV® or secure SFTP file transfer protocols.

From Optional to Obligatory: DSA/DSP Reporting

Many intermediaries now require fund companies to receive detailed sales data transmissions as a pre-requisite for listing on their platforms. Fund companies are required to receive, process, and manage the transmitted files. Only by having a vendor with a connection to Omni/SERV® or by establishing a dedicated SFTP can fund companies receive the required DSA / DSP files. SFS provides funds a secure and efficient means of receiving this data and SFS' MARS Platform provides an opportunity to leverage the data for operational advantage.

From Obligation to Opportunity: The Potential of DSA / DSP Files

DSA/DSP data is abundant in details and offers the potential for valuable insights through data analytics that can inform sales strategy and help to drive new business. The MARS sales reporting and data analytics platform is the industry-leading application designed to leverage this data for maximum strategic value.

[Compliance with 22c-2](#): For intermediaries, the now mandated DSA /DSP files enable them to fulfill SEC Rule 22c-2 requirements. DSA and DSP files, provided by the intermediary to their platform funds, break out the details of individual trades that would otherwise be masked within the fund company's omnibus account.

[Sales Insights](#): For fund companies, DSA and DSP files are a goldmine of data that can be leveraged for ongoing strategic purposes. MARS data analytics reveals sales trends, intermediary performance, and investor behaviors. These insights can shape strategic decisions and optimize fund performance. Fund companies can understand where and by whom their funds are being distributed and identify avenues for strategic expansion.

The Way Forward: Leveraging DSA/DSP Data

"Now more than ever fund companies need to be forward-thinking," said Nicole Callies of SFS. "Mandatory DSA and DSP files can give fund companies a competitive edge. The MARS Platform seamlessly ingests DSA and DSP files and applies data analytics to uncover critical hidden narratives within the data."

About SFS

SFS is a fintech leader in the asset management industry and provider of the MARS sales reporting and data analytics product suite for optimizing sales strategy. SFS services include data collection, data cleaning, sales reporting, data analytics, CRM, and 22c-2 compliance management. SFS' headquarters is located in Larkspur, California.

Nicole Callies

SalesFocus Solutions

+1 414.795.6956

ncallies@sfsmars.com

This press release can be viewed online at: <https://www.einpresswire.com/article/666191307>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2023 Newsmatics Inc. All Right Reserved.