

Broadridge Strengthens Platform for Alternative Investment Managers with New General Ledger Capabilities and a Redesigned User Interface

2025-12-16

NEW YORK and LONDON, Dec. 16, 2025 /PRNewswire/ -- Global fintech leader **Broadridge Financial Solutions, Inc.** (NYSE: BR) today announced significant enhancements to its multi-asset portfolio and trade order management platform, introducing fully integrated general ledger capabilities and a redesigned user interface (UI). These upgrades mark an important step forward in Broadridge's strategy to deliver a unified, front-to-back investment management solution that increases operational efficiency, elevates fiduciary oversight, and supports faster, more informed decision-making for buy-side firms.

"Across the alternatives and broader asset management landscape, firms are under tremendous pressure to modernize fragmented technology stacks, enhance controls, and differentiate in an increasingly competitive market," said Frank Cataudo, General Manager of Investment Management Solutions, Broadridge. "Broadridge is investing meaningfully in the evolution of our platform to help clients meet these challenges head-on. The addition of an integrated general ledger and our redesigned UI reflect our commitment to providing a more unified, transparent, and scalable platform for the next generation of investment management solutions."

The new general ledger capabilities extend Broadridge's portfolio management system by embedding period accounting and financial statement reporting directly into the investment platform. The solution provides a fund-level general ledger that systematically posts accounting entries for all investment activity, offers tools for period adjustments, introduces workflows to close the period, and provides out-of-the-box financial statements. By offering a comprehensive shadow book of record, clients can improve the accuracy and efficiency of their month-end close and compare seamlessly against official fund administrator books and records.

As asset managers face mounting demands for transparency, automation, and regulatory compliance, the

integrated general ledger supports improved fiduciary controls, operational stability, and data accuracy. The architecture is also built to support next-generation scalability and future global compatibility.

Complementing the new general ledger functionality, Broadridge has introduced a redesigned UI that delivers a modern, intuitive, and consolidated workspace for portfolio managers and traders. The updated UI optimizes workflows, and unifies portfolio management, risk management, analytics, and reporting into a single experience—reducing the need to navigate across multiple screens and enabling faster, more informed decision-making.

Broadridge's multi-asset portfolio and trade order management platform is recognized as a leading solution for asset managers, hedge funds, asset owners, and other buy-side firms, offering seamless integration across diverse asset classes to enhance decision-making and operational efficiency.

About Broadridge

Broadridge Financial Solutions (NYSE: BR) is a global technology leader with trusted expertise and transformative technology, helping clients and the financial services industry operate, innovate, and grow. We power investing, governance, and communications for our clients – driving operational resiliency, elevating business performance, and transforming investor experiences.

Our technology and operations platforms process and generate over 7 billion communications annually and underpin the daily average trading of over \$15 trillion in equities, fixed income, and other securities globally. A certified Great Place to Work®, Broadridge is part of the S&P 500® Index, employing over 15,000 associates in 21 countries.

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