

Everest Group Names Broadridge BPO as a Leader in 2025 Capital Markets Operations Services PEAK Matrix® Assessment

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Leaders recognition highlights Broadridge's successful accelerated strategy to invest in technology and innovation to drive business value for its BPO clients across capital markets, wealth and asset management

NEW YORK, Sept. 15, 2025 /PRNewswire/ -- **Broadridge Financial Solutions, Inc.** (NYSE: BR), a global Fintech leader, today announced its recognition as a Leader in capital markets operations by independent research firm **Everest Group** in its 2025 Capital Markets Operations Services PEAK Matrix® Assessment.

"Broadridge's continued focus on innovation and efficiency within capital markets operations has strengthened its ability to deliver scalability, resilience, and measurable value for its clients on both the sell-side and the buy-side," says Srawesh Subba, Practice Director, Everest Group. "Its combination of deep industry expertise, strong technology innovation, and a comprehensive service delivery model distinguishes it from competitors. By expanding its capabilities through innovations such as OpsGPT, modular control dashboards, as well as acquisitions and partnerships, Broadridge has grown its buy-side and sell-side footprint while maintaining consistency in overall delivery. Its execution maturity and technology-led financial services BPO have earned it both Leader and Star Performer recognition in Everest Group's Capital Markets Operations PEAK Matrix® Assessment 2025."

"We are proud to be recognized by Everest Group and our clients for our leadership in capital markets operations outsourcing," said Thomas Giacalone, Global Head of Business Process Outsourcing (BPO) at Broadridge. "Our mission is to help firms manage complexity, reduce risk, and optimize costs through our technology first approach. This recognition highlights the strength of our global delivery network, deep market expertise, and leading innovations like OpsGPT that are reimagining operations and have made Broadridge the trusted strategic partner to capital markets, wealth, and asset management firms worldwide."

In this report, Everest Group evaluated the global market activity and investments of 22 leading providers delivering capital markets operations services within the BFS industry, using data from calendar year 2025. Assessments included interactions with clients, reference checks, and ongoing market analysis. Leading firms demonstrated:

- Enterprise-grade capital markets operations portfolios, spanning pre-trade, trade, and post-trade processes with depth across buy-side, sell-side, and infrastructure clients.
- Mature proprietary platforms, generative AI-native toolkits, and scaled managed services to deliver transformation-led engagements across onboarding, reconciliation, fund accounting, regulatory reporting, and more.
- Strong adoption across global financial hubs, scaled delivery footprint, and market-leading BPaaS innovation and commercial model evolution.
- Multi-tower outsourcing, platform integration, and full-life cycle operating model redesigns.

On the buy-side, Broadridge's strategic technology and operations service bundle Broadridge's Portfolio Master and Sentry technology capabilities together enabling global asset managers and hedge funds to mutualize cost, optimize operations, and drive continuous innovation and digital transformation front-to-back.

As markets prepare for T+1 settlement in the UK, EU, and Asia, upcoming US treasury central clearing requirements, and extended trading hours in the US, firms need more resilient and efficient operating models. Broadridge's Business Process Outsourcing solution is designed to meet these needs head-on, combining deep domain expertise, advanced technology capabilities, and a flexible, open ecosystem that integrates seamlessly with client and third-party platforms. Broadridge enables firms to strengthen resilience, streamline workflows across the trade lifecycle, and confidently adapt to regulatory and market change while unlocking efficiencies that fuel future growth.

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About Everest Group

Everest Group is a leading global research firm helping business leaders make confident decisions. Everest

Group's PEAK Matrix® assessments provide the analysis and insights enterprises need to make critical selection decisions about global services providers, locations, and products and solutions within various market segments. Likewise, providers of these services, products, and solutions, look to the PEAK Matrix® to gauge and calibrate their offerings against others in the industry or market. Find further details and in-depth content at www.everestgrp.com.

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.

For more information, please visit www.broadridge.com.

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