

canoe

CANOEINTELLIGENCE.COM

CANOE INTELLIGENCE

Automated Alternatives Document & Data Management

Powering alternative investment Intelligence.

WHILE DOCUMENT AND DATA MANAGEMENT IS VITAL, IT DOES NOT DRIVE SCALE, BOOST PERFORMANCE, OR DIFFERENTIATE YOUR FIRM. Automating these tasks does. With Canoe, you can separate your firm from the rest and immediately drive client value. Free your team from alternatives document collection, data extraction, and data delivery. Gain deeper access to data. Generate investment insights with more confidence.

500+ alternative investors are fortifying their firms with Canoe.

By introducing automation to alternatives document collection and data management workflows, institutional investors, wealth managers, and general partners are seeing dramatic improvements in data accuracy and access, team efficiency, and client satisfaction.

94%

ROI ON TIME SPENT COLLECTING DOCUMENTS from 18 hours to 1 hour per month

500+

CONNECTIONS UPSTREAM AND DOWNSTREAM to ease document collection, data reporting, and analytics workflows

20X

INCREASE IN THE NUMBER OF FUNDS PROCESSED by each employee

How does Canoe Intelligence work?

Canoe automates the collection and categorization of alternative investment documents from 500+ GP and administrator portals, extracts and validates the relevant data elements from those documents using shared intelligence from 44,000+ funds, and ultimately delivers clean, actionable data to our clients' downstream systems.

THE WORKFLOW

Alternatives Documents Become Actionable Data Insights

DOCUMENT MANAGEMENT

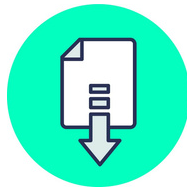
DATA MANAGEMENT

Collect



Leverage Canoe Connect to **retrieve all documents** automatically from GP portals and email inboxes

Track



Identify late or missing documents with **real-time dashboarding** Notify users to initiate firm-specific workflows

Organize



Categorize, rename and save documents by user preference

Store documents in a cloud-based central repository or transfer to native location via API

Extract



Extract and normalize data using proprietary **Shared Intelligence technology**

Access tailored, industry-specific data libraries

Validate



Execute hundreds of automated data rules and **ensure extracted data is reliable**

Proactively drive users to docs requiring their expertise

Deliver



Deliver data via API or in a format compatible with the downstream accounting, reporting and analytics platforms with **system-agnostic approach**

AUTOMATION

ENRICHMENT

INTEGRATION

Why leading alternative investors choose Canoe.

Achieve Operational Efficiency. Serve Clients More Confidently. Scale Business Growth.



PIONEERS IN ALTERNATIVES TECHNOLOGY

Canoe is purpose-built for industry experts by industry experts. Our experience and know-how drives our ability to successfully automate every manual task related to alternatives document and data management.



BACKED BY INNOVATORS

From clients to investors to partners, our network is full of industry changemakers who are united in advancing the state of alternative investments and trust Canoe to power the evolution.



THE ALTERNATIVES ECOSYSTEM

Whether it be connecting with GPs and portal providers to automate document collection or integrating seamlessly with reporting systems to streamline analysis, Canoe's ecosystem elevates the practice of alternative investing for all.



SHARED INTELLIGENCE

When clients use Canoe to automate their alternatives data management, they are actively contributing to a stronger and more connected industry. The data within every new fund document introduced is mapped, speeding onboarding and improving data extraction accuracy.

Automate your alternatives document and data work with Canoe.

SEE CANOE IN ACTION