



# **CACEIS**

## **Transforming Wealth and Asset Management Services**

**Vendor Assessment  
Report Abstract**

**July 2021**

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**7 pages**





## Who Is This Vendor Assessment For?

NelsonHall's Transforming Wealth & Asset Management Services Vendor Assessment for CACEIS is a comprehensive assessment of CACEIS's wealth and asset management services offerings and capabilities designed for:

- Sourcing managers monitoring the capabilities of existing suppliers of intelligent automation processes and identifying vendor suitability for wealth and asset management services RFPs
- Vendor marketing, sales and business managers looking to benchmark themselves against their peers
- Financial analysts and investors specializing in the support services sector.



## Key Findings & Highlights

CACEIS was founded in 2005 by Crédit Agricole and Caisse d'Épargne to provide asset servicing for all asset classes. Over time the owner has changed to Crédit Agricole (69.5%) and Santander (30.5%). The addition of Santander to the ownership structure added presence in the LATAM marketplace for CACEIS. Clients include its parents and other European asset managers. CACEIS provides asset management services for clients, not wealth management services. Today's services include the full range of operations support for all asset classes. CACEIS operates across the world with 15 delivery sites. As of year-end 2020, CACEIS had \$5.2 Trn in assets under custody.

## Scope of the Report

The report provides a comprehensive and objective analysis of wealth and asset management services offerings, capabilities, and market and financial strength, including:

- Identification of the company's strategy, emphases and new developments
- Analysis of the company's strengths, weaknesses and outlook
- Revenue estimates
- Analysis of the profile of the company's customer base including the company's targeting strategy and examples of current contracts
- Analysis of the company's offerings and key service components
- Analysis of the company's delivery organization including the location of delivery locations.

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## Report Length

7 pages

## W&A Services Vendor Assessments Also Available for:

Atos

Avaloq

CACEIS

Capgemini

Coforge

DXC

Fenergo

FIS

Genpact

Infosys

Mindtree

Mphasis

Quantiphi

TCS

Virtusa

Wipro