

CENTRL

DUE DILIGENCE PLATFORM

DD360

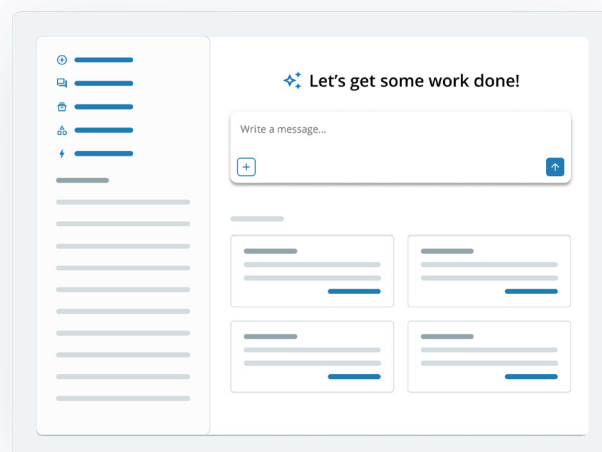
The AI-powered due diligence platform
for the investment management industry

DD360 is the most comprehensive AI-powered due diligence platform for the investment management industry, bringing dramatic efficiency to your diligence processes. The platform's automation, combined with agentic AI, significantly reduces manual work – allowing analysts to devote their expertise to more strategic initiatives.

INTRODUCING CENTRLX – AGENTIC AI ACROSS YOUR DILIGENCE PROCESS

CentrlX is a first-of-its-kind agentic AI platform purpose-built for the investment industry. Inside DD360, CentrlX agents take on the laborious evaluation steps of due diligence: sifting through responses and documentation at speed, populating questionnaire data from responders, flagging responses that need further review, and attaching supporting rationale for the analyst to consider.

Agents are built by CENTRL practitioners and configurable to your firm's methodology, terminology and scoring – so they apply your process consistently, under permissions and review controls your risk and compliance teams can defend.



An AI analyst alongside your team

Agents collaborate with human analysts, amplifying expertise rather than replacing judgment

100% traceability

Every response, action and approval logged with a detailed audit trail for transparency

Minutes, not days

Diligence tasks that consumed analyst weeks complete in a single working session

Improves with your feedback

Agents learn from reviewer behavior and feedback to continuously refine accuracy

Human in the loop

People review, refine and approve outputs before anything is shared or committed

Enterprise-grade security

Role- and team-based permissions with the highest level of data protection

95%+

accuracy on AI-completed evaluation steps, with every flagged response carrying the rationale behind it – so analysts review a recommendation, not a black box.

WHAT'S INSIDE DD360



DDQ automation

Digitized templates, rules and workflow, auto-scoring and side-by-side answer review



Issue management

Publish issues to managers, set severity and run action plans through remediation



Analytics & reporting

Benchmarking across managers, self-serve reports and executive Word or PDF output



Manager portal

Your branded portal for reports, clarifications and permissioned client access

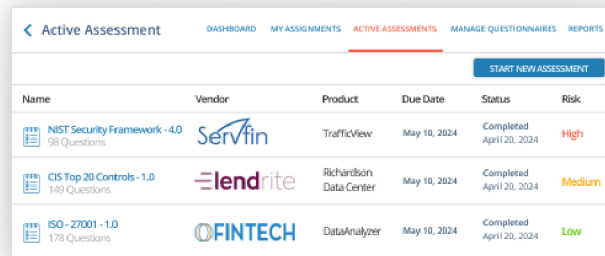
THE MOST POWERFUL AUTOMATION IN THE INDUSTRY

Digitize your own templates, or start from rebuilt industry-standard templates from AIMA, ILPA, ICI and others.

A fully configurable rules and workflow engine handles risk identification, internal delegation, approval queues and custom reminders.

Revised responses are surfaced for analysts to review current and previous answers side by side.

Auto-scoring support greatly simplifies the evaluation process.



Name	Vendor	Product	Due Date	Status	Risk
NIST Security Framework - 4.0 58 Questions	Servfin	TrafficView	May 18, 2024	Completed April 20, 2024	High
CIS Top 20 Controls - 1.0 149 Questions	lendrite	Richardson Data Center	May 18, 2024	Completed April 20, 2024	Medium
ISO-27001 - 1.0 178 Questions	FINTECH	DataAnalyzer	May 18, 2024	Completed April 20, 2024	Low

A SINGLE SOURCE OF TRUTH

Documents are centralized in one library with powerful search — including search within the document.

Colleagues and managers collaborate in place with clarifications, comments and tagging, backed by a detailed audit trail.

Publish issues to managers, interact through the portal on updates and severity, and create action plans to manage remediation.

Fund and strategy data is managed all in one place.

DEEP ANALYTICS AND REPORTING

An embedded analytics engine provides deep benchmarking and trends across managers.

Investment teams can work with historical cross-sectional data across funds to develop correlations and other insights.

Run operational reports across the portfolio with real-time, self-serve reporting.

Generate executive reports in Word or PDF from any data in the application, and build bespoke dashboards to highlight risks and exceptions and track team KPIs.

BUILT TO BRING DRAMATIC EFFICIENCY IMPROVEMENTS

Publish reports to clients, control permissions on published reports, and track statistics on client usage.

Interact with managers inside your own branded portal — receive reports and work through issues and clarifications with your team.

Augment managers' remote DDQ assessment with information from onsite audits.

"Now it's all there on the system — we can see where everything is and where it is in the process. It saves our team a couple of months each year, and reduces the time our weekly, monthly, quarterly and annual reporting takes by about 50%."

— Global Fund of Funds

"We looked at all the investment management due diligence solutions in the market and chose CENTRL because it was the most complete. It is very easy to use, has the greatest depth of functionality and analytics, and the flexibility to adapt to our process."

— Leading Due Diligence Consultant