



# Accelerating Derivatives Documentation Processing with SmartDX™ and CounterParty Manager

Information and its availability are critical in today's regulatory environment. Often, document management processes are inefficient due to underlying manual processes that are lacking in transparency and error-prone.

These issues are particularly acute with relationship agreement documentation, specifically in the negotiation of ISDA Master Agreements, CSAs and Master Confirmation Agreements (MCAs). Negotiations are lengthy and time-consuming, frequently frustrating for both parties involved, often more complex than necessary, and far from opaque.

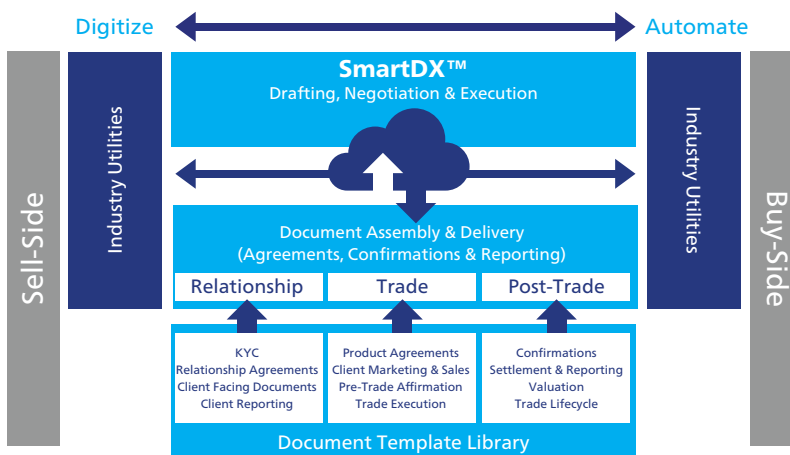
Improve these processes by using the combined solution of **IHS Markit Counterparty Manager** (MCPM) with **SmartDX™**. Together these solutions provide a secure platform that enables up to 10,000 corporations and 900 buy-side clients to seamlessly interact with each other for the introduction, generation, negotiation and execution of MCA agreements. This integration adds the following features to your negotiations:

- **Transparency:** SmartDX has a fully-auditable and transparent dashboard that tracks the current status of each document, allowing one version of the document to be reviewed, negotiated, amended and executed.

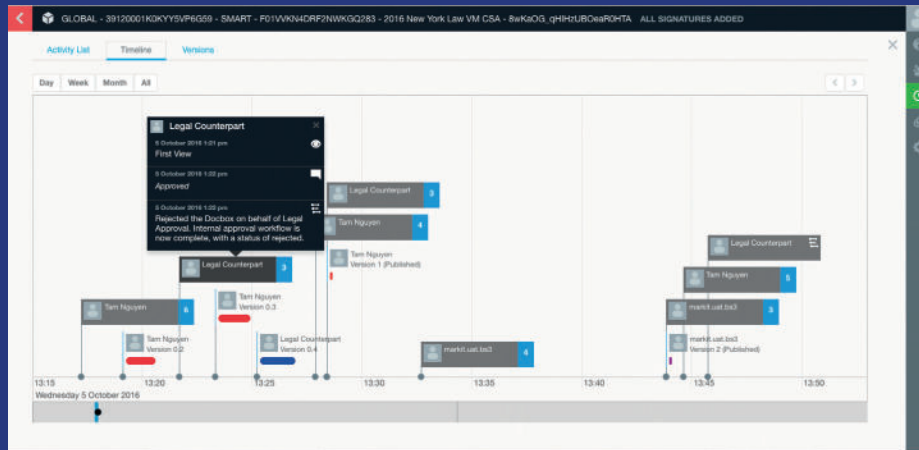
- **Availability:** MCPM facilitates the secure digitalized storage of all documentation and data. This allows the data within the documents to be extracted, interrogated and portable so it can easily be consumed by users and systems. Through this partnership an upstream consumer, such as Pricing & Trading, and downstream consumers such as Risk Management and Collateral Management, can quickly and efficiently utilize the data.

- **Compliance:** SmartDX utilizes industry standard templates that can be configured to meet your needs. MCPM supports the KYC process management, helping to ensure that the document generation process meets the latest regulatory confirmation timeliness obligations.

- **Flexibility and Scalability:** MCPM and SmartDX are seamlessly integrated, scalable and offer a solution that reduces the costs incurred by the industry to support relationship agreements. Users have access to an online collaborative negotiation environment, in which the time taken to negotiate and execute any relationship agreement is greatly reduced.



*SmartDX is at the center of the document generation and negotiation process for all agreements - ISDA master agreements, CSAs and MCAs.*



Timeline of key decisions and events around negotiation of an MCA within a SmartDX™ Docbox



## The SmartDX™ Solution

You've got to have a way to scale the conversation. And that means more than scanning your documents into an OCR reader. You want your documents to be created digitally, shared digitally, and stored digitally. And it takes three things to deliver a solution like that:



### Undivided Attention

We're totally committed to becoming the industry standard... and we already are the standard for the G15.



### Exceptional Usability

No one does more to simplify collaboration and streamline OTC trading... from relationship to trade to post-trade documentation.



### Undivided Attention

To maximize efficiency, our solution is built with a true multi-tenant cloud platform plus hybrid-cloud capabilities.

**That's why major investment banks such as Goldman Sachs, Deutsche Bank, and Barclays all rely on Smart Communications™.**

**Counterparty Manager** is a secure document repository which sits at the core of IHS Markit's regulatory ecosystem including kyc.com, tax, credit and legal entity data. It is used by approximately 80 banks, 900 buy-side firms and 6,000 corporates. IHS Markit and Smart Communications established its partnership in Q4 2014 to create an electronic service for various derivatives agreements.

## Connect with Us



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**Smart Communications™** helps the world's largest enterprises simplify their customer and business communications – while making those communications do even more. In 2004, we pioneered the new generation of CCM solutions, and today we're still leading this industry as the only cloud/hybrid-cloud solution in the Gartner leaders' quadrant. Smart Communications customers rely on our team for the undivided attention of the only independent company 100% focused on enterprise CCM. No one does more to simplify template management and put so much control in the hands of the user. That's why more than 300 global brands – many in the world's most highly regulated industries – rely on us to scale the conversation.

Smart Communications is headquartered in London and serves its customers from offices located in North America, Europe, and Asia Pacific. The company offers a range of solutions including SmartCOMM™, SmartDX™, SmartCORR™ for Salesforce and SmartCaaS™ for Partners.