Bloomberg

Transforming the future of asset management in India

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The Indian mutual fund industry is evolving at breakneck speed. With AUM growing rapidly and more than 2,000 schemes now active in the market, the pressure to maintain efficiency while managing complexity has never been higher.

Building a more resilient buy-side workflow

India's buy side is increasingly demanding more integrated, controlled workflows to remain competitive in faster markets with rising regulatory expectations. The transition to a more resilient operating model relies on a comprehensive approach to enhancing how the investment lifecycle is managed:

- Research, order management and portfolio analytics work most effectively when aligned within a single, cohesive process, reducing duplication and limiting manual risk
- One single embedded platform to manage the firmwide investment risk framework – regulatory limits as well as portfolio investment risk – helps deliver greater efficiencies and working insights into the daily investment decision-making workflows
- Integrated risk and compliance facilitate centralized controls across the portfolio lifecycle, helping narrow the gap between analytics and execution while being a central aspect of alpha generation
- Investment performance is better supported by current benchmark data and automated trade processes that minimize tracking error and narrow the gap between insight and execution
- Centralized, transparent audit trails create a stronger foundation for efficient reporting and consistent, defensible trade reconstruction

Bloomberg Buy-Side Solutions

Bloomberg's integrated solutions for investment management allow you to oversee the entire investment lifecycle in one scalable, hosted suite of tools.

Seamless research & portfolio management

Research Management Solutions (RMS) centralizes internal and external research in a single location, enabling teams to create, distribute and collaborate on investment insights across the firm.

Meanwhile, Portfolio & Risk Analytics (PORT) provides multi-asset portfolio analytics, linking analyst ideas directly to exposures, performance drivers and risk contributions.

Together, RMS and PORT allow investment teams to connect research to portfolio impact, identifying sources of risk and return across equities, fixed income, commodities and alternative investments, and making decisions with a clear, data-driven view of exposures.

Precision execution management

Asset & Investment Manager (AIM) is Bloomberg's order and investment management solution, designed to manage the full trade lifecycle.

With integrated order and execution management capabilities, AIM enables teams to receive, route, execute and monitor trades electronically within a single interface. Portfolio managers gain real-time visibility into orders, cash and liquidity, while automated workflows support straight-through processing from trade discovery through settlement, reducing manual touchpoints and improving operational control.

Embedded risk & compliance

Bloomberg's Multi-Asset Risk System (MARS) delivers advanced risk analytics and enterprise risk management across asset classes.

It supports pre- and post-trade risk monitoring with a broad library of configurable limits and compliance rules, including region-specific regulatory templates. A comprehensive audit trail across the order lifecycle helps firms maintain consistent oversight, support regulatory reporting and manage risk objectively across portfolios.

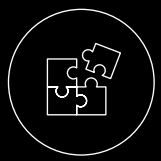
Why leading Indian asset managers choose Bloomberg



Total portfolio control

See everything

Provide total portfolio control



Unified workflows

Act seamlessly

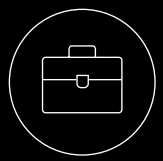
Seamlessly connect the investment process



Trusted technology

Build and evolve freely

Power growth with modern and scalable technology



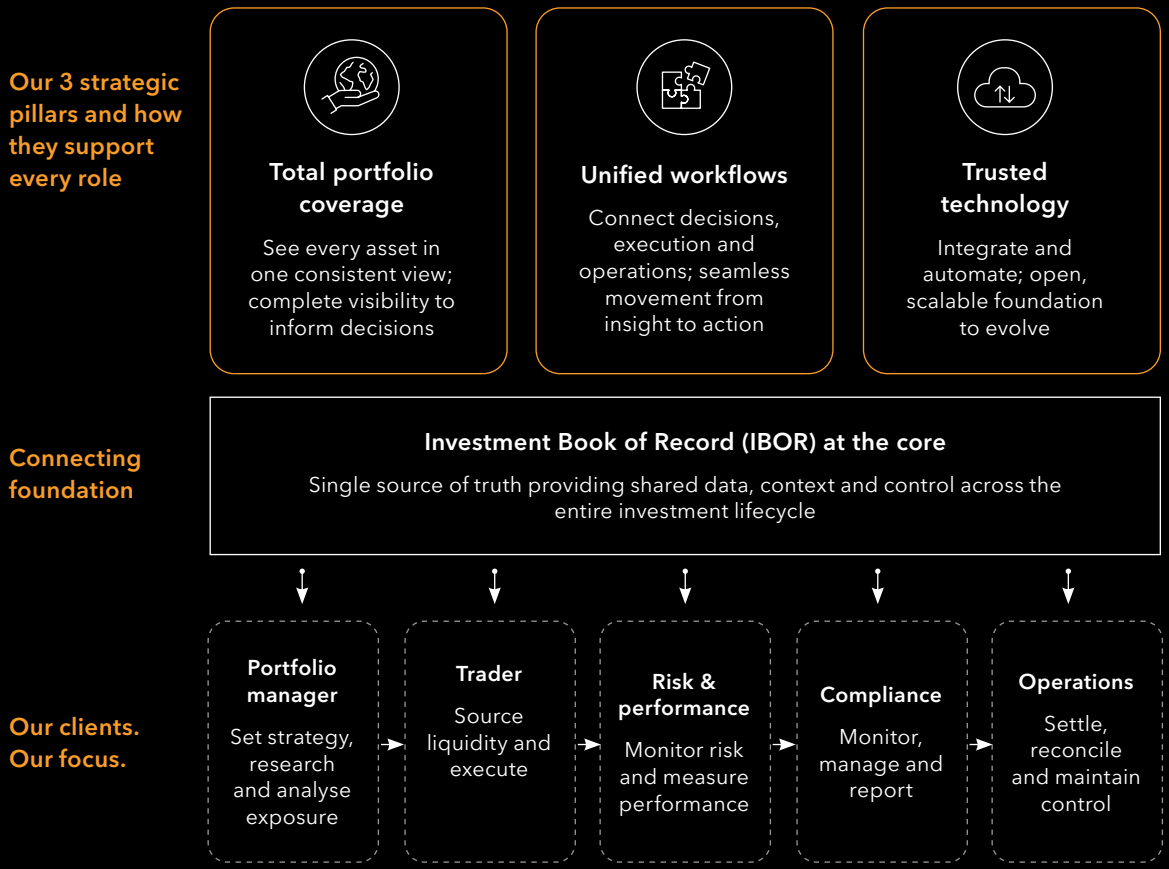
Buy–side personas

Build and evolve freely

Empower investment professionals

Three strategic pillars – one connected operating model

Designed to support the roles, workflows and decisions that matter across the buy-side investment lifecycle



One connected operating model that brings total portfolio control to every role across the investment lifecycle

Your path to transformation

We utilize a proven roadmap to expedite implementation, ensuring a seamless progression from initial scoping and configuration to rigorous UAT and parallel testing. To learn more about how Bloomberg can help enhance your workflow, reach out to vge3@bloomberg.net

Supporting Specialized Investment Funds

Specialized Investment Funds (SIFs) can combine sophisticated strategies across equities, derivatives, debt and money market instruments, increasing the need for a consistent view of exposures and controls throughout the investment process. Bloomberg brings portfolio analytics, order and execution management, risk and compliance into connected workflows, helping investment teams move from investment idea to execution and oversight with greater clarity and control.

See the whole strategy

Portfolio & Risk Analytics (PORT) provides multi-asset portfolio analytics that connect positions and investment ideas to exposures, performance drivers and risk contributions. SIF teams can assess sources of risk and return across strategies and asset classes in one consistent portfolio view.

Move from decision to execution

Asset & Investment Manager (AIM) supports the full trade lifecycle, with integrated order and execution management, real-time visibility into orders, cash and liquidity, and automated workflows from trade discovery through settlement.

Apply controls in context

AIM's Compliance Manager (CMGR) supports real-time compliance checks within the trading workflow. Bloomberg's Multi-Asset Risk System (MARS) provides multi-asset risk analytics and configurable pre- and post-trade monitoring across portfolios.

Multi–asset support for SIFs

Equities	Stock / index futures	Stock / index options	Debt	Money market	Hybrid strategies
Cash equities & ETFs	Single stock & index futures	Calls, puts & multi-leg structures	Government, corporate & fixed income	Cash, repos, CP, CDs & T-bills	Strategies combining multiple asset classes

Strategy–aware compliance for complex, multi–asset investments

Complex strategies cannot always be understood position by position. Where the applicable compliance rules permit, Bloomberg's Compliance Manager (CMGR) can recognize qualifying offsetting positions and assess the relevant net exposure, helping reduce false breaches and unnecessary overrides. Where offsetting is not allowed, positions continue to be assessed on a gross basis.

SIF–specific control capabilities

Intelligent offset recognition
Qualifying positions that offset one another can be evaluated together, so compliance reflects the economic exposure of the strategy rather than each leg in isolation.

Expiration-aware analytics
CMGR monitors offsets across instruments and expiration dates in real time, supporting visibility as positions approach expiry and strategies roll.

Aggregate exposure view
Teams can see consolidated exposure across relevant expiries and instruments, supporting more consistent control of multi-leg and multi-strategy portfolios.

Real–time compliance workflow



One connected operating model

By combining portfolio analytics, execution management, risk and compliance, Bloomberg enables SIF managers to support sophisticated multi-strategy portfolios without creating separate tools and control processes for each asset class. The result is a more connected path from portfolio decision to trade execution, risk oversight and compliance control.

Take the next step.

For additional information, press the **<HELP>** key twice on the Bloomberg Terminal®.

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