

# 3PM News Market Watch



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## The Places We'll Go.

**LETTER FROM THE PRESIDENT**  
**SANDRA POWERS MURPHY, CEO ARK GLOBAL**

Oh the places we'll go is right! The Third Party Marketers Association ("3PM") began in 1999 with seven member firms, and today brings together a global constituency of marketers, managers and industry product and service providers.

Over time, the Association has played an active and pivotal role in industry advocacy and education on topics ranging from regulations, firm development, and contracting, through marketing and sales best practices. Our membership roster includes established and new 3PM firms, investment management firms, service providers and other industry associates who support our endeavors.

NOW - almost 22 years later, 3PM is excited to announce the FUTURE of the Association. We have great things in store for our membership and partners. Join us on July 13 at 10 am EST as we announce the [FUTURE OF 3PM](#).



# MEMBERS IN THE NEWS | Zephyr's PSN SMA Data Group Partners With IMSS Providing A Turnkey Data Management Solution

June 29, 2022

Investment Management Support Solutions LLC (IMSS) has announced a partnership with Zephyr, a subsidiary of Informa plc (LSE: INF) and PSN SMA Data Group, allowing investment managers to extend the distribution of qualitative and quantitative information globally. The announcement comes at a time of significant growth within the managed account sector for investors as well as double digit growth in new managed account offerings.

Trisha Sandoz, IMSS founder and CEO is "pleased to partner with PSN SMA Data Group to provide a cost-effective, efficient data solution to its global client base through our proprietary Data-Centrix™ automation software. Through this partnership, clients can dramatically reduce resource allocations and improve quality of data management through this innovative solution."

Margaret Tobiasen, Senior Vice President of Data Distribution, who oversees PSN SMA Data Group adds that "PSN continues to offer an important platform for investment managers to showcase their products; we look forward to additional opportunities that our partnership with IMSS will bring to our managers."

## ABOUT IMSS

IMSS is a leading resource for database management and automation. The company also provides vital database overview, existing profile clean-up, ongoing updates and maintenance. Its comprehensive onboarding is customized for new firms, offering a strategic review to maximize client goals. IMSS also assists with managers with initial draft RFP & DDQ creation. Visit [imss-llc.com](https://imss-llc.com) to learn more.

## ABOUT ZEPHYR'S PSN SMA DATA GROUP

**Zephyr PSN SMA Data Group** is the longest running SMA database in the world. Over the nearly four decades since it launched, PSN has continually pioneered the delivery of valuable SMA data to its customers, always accurate, consistently verified. Where there was no access, PSN built inroads and set the standard in 1984. Today, it leads the way in providing unbiased, high quality, detailed information across 2000 data points.

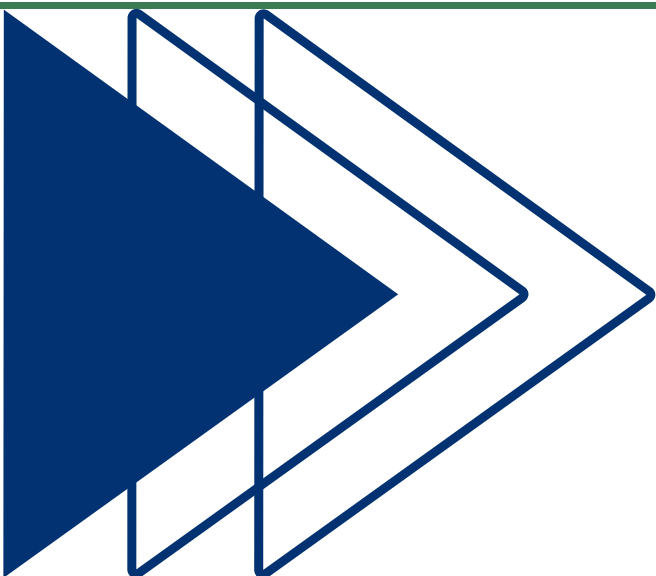
**IMSS is  
pleased to  
announce its  
partnership  
with Zephyr's  
PSN SMA  
Data Group!**

Access Partnership Perks Here  
[imss-llc.com](https://imss-llc.com)



What's more, this partnership comes with some short term perks... get your data moving today.





# Introducing Investment Management Distribution.

**Serving Denmark, Norway and Sweden, Investment Management Distribution is positioned to adapt and deliver for their clients.**

Christian Jessen. Partner at [Investment Management Distribution](#) and long-time member of the Third Party Marketers Association, Christian and his team are a force in global markets. We were thrilled for the opportunity to learn more about the vision, the purpose and the goals set forth in motion for the many years to come.

## **Tell us about your business. What do you focus on?**

We provide superior asset managers access to the Scandinavian Markets through relationship building, public relations, and business development. We enjoy working with US managers for many reasons including better opportunities for us to provide value-added services, and a better fit with the values we support through our membership and education from the CFA Institute and the Third Party Marketeers Association. We have also experienced that US managers always support us well, which increases the probabilities of winning mandates and finding limited partners within private equity.

## **What type of clients do you serve?**

First Institutional Investors including Pension Funds, Foundations, Ultra High Net Worth and Family Offices, Banks and Insurance Companies. Second attractive distributors.

## **What types of managers or opportunities are the best fit for your firms?**

Asset managers with strong owners and track records. These are often larger US Boutique asset managers and private equity funds with strong GPs. Asset Classes: Private Equity and Venture Capital Funds; Infrastructure and Green Investments, Credits and listed Equity.

## **What do you encourage managers to do differently or better?**

We often advise on adjustments to the pitch book and the marketing support. This includes adaptations for the Nordic Markets, where investors have lesser knowledge of the structures and regulations of the US financial markets. Some asset managers, but not all, are recommended to seek pan-European marketing permission.

## **Looking ahead, what is your team most looking forward to?**

We only focus on the foundations – be it building solid relationships for great asset managers in Scandanavia and attracting more investments and mandates for our clients.





# Trending News

## [After terrible first half, 2022 may bring more bad news for US markets](#)

*Business Standard*

US markets are beginning to fear that they are not even halfway through the bad news the year 2022 has in store, media reports said.

## [Global markets are tanking ahead of a huge week for central banks](#)

*CNBC*

Global stock markets are falling sharply after May's U.S. inflation print reignited fears that central banks will be forced into aggressive monetary policy tightening.

## [China's World-Beating Stock Rally Is Forecast to Strengthen More](#)

*Bloomberg News*

It's official: Chinese equities are once again in vogue, after months of regulatory crackdowns, deleveraging and stringent virus curbs wiped trillions of dollars off benchmark gauges.

## Global Focus

The Third Party Marketing Association's Global Committee is seeking volunteers! If you have a desire to make a global impact and assist in connecting 3PMs throughout the world, consider joining the committee. To learn more, [contact 3PM](#).

