



Fund Administration Software Category

WINTER 2026
Customer Success Report





Fund Administration Software Category

To thrive in the digital era, businesses need digital solutions. One of them is fund administration software designed to improve all aspects of funds management. With Fund Administration Software, it becomes much easier to control unprecedented amounts of financial data and reporting. Fund administration software offers a great range of features and benefits as described below.

Customer Success Report Ranking Methodology

The FeaturedCustomers Customer Success ranking is based on data from our customer reference platform, market presence, web presence, & social presence as well as additional data aggregated from online sources and media properties. Our ranking engine applies an algorithm to all data collected to calculate the final Customer Success Report rankings.

The overall Customer Success ranking is a weighted average based on 3 parts:

CONTENT SCORE

- ✓ Total # of vendor generated customer references (case studies, success stories, testimonials, and customer videos)
- ✓ Customer reference rating score
- ✓ Year-over-year change in amount of customer references on FeaturedCustomers platform
- ✓ Total # of profile views on FeaturedCustomers platform
- ✓ Total # of customer reference views on FeaturedCustomers platform

MARKET PRESENCE SCORE

- ✓ Social media followers including LinkedIn, Twitter, & Facebook
- ✓ Vendor momentum based on web traffic and search trends
- ✓ Organic SEO key term rankings
- ✓ Company presence including # of press mentions

COMPANY SCORE

- ✓ Total # of employees (based on social media and public resources)
- ✓ Year-over-year change in # of employees over past 12 months
- ✓ Glassdoor ranking
- ✓ Venture capital raised

Award Levels



MARKET LEADER

Vendor on FeaturedCustomers.com with substantial customer base & market share. Leaders have the highest ratio of customer success content, content quality score, and social media presence relative to company size.



TOP PERFORMER

Vendor on FeaturedCustomers.com with significant market presence and resources and enough customer reference content to validate their vision. Top Performer's products are highly rated by its customers but have not achieved the customer base and scale of a Market Leader.



RISING STAR

Vendor on FeaturedCustomers.com that does not have the market presence of Market Leaders or Top Performers, but understands where the market is going and has disruptive technology. Rising Stars have been around long enough to establish momentum and a minimum amount of customer reference content along with a growing social presence.

2026 Customer Success Awards

Check out this list of the highest rated Fund Administration Software based on the FeaturedCustomers Customer Success Report.



ALLVUE 



 eFront a part of BlackRock



FINARTIS

FundCount

Juniper Square

temenos



BRITech



Fundwave



SimCorp

* Companies listed in alphabetical order



**2026
FUND
ADMINISTRATION
SOFTWARE**

MARKET LEADER





ABOUT ALLVUE SYSTEMS



Allvue Systems is a leading provider of investment management solutions for fund managers, investors, and administrators in the alternative investments industry. They offer innovative, configurable investment software that eliminates the barriers between systems, information, and people, optimizing decision making and streamlining processes to meet investor needs across private debt, private equity, and other alternative asset classes. Allvue Systems was established in 2019 through the merger of Black Mountain Systems and AltaReturn, and currently manages over \$2.5 trillion in assets on its platform. The company is based in Miami, FL with locations...

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TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“The inspiration for Inventure was that we looked at a lot of the traditional fund management industry and corporate services providers, and we saw a real gap – a lack of use of technology and data in that. We’re building a digitally native platform, and we’re very excited that we don’t see a lot of the legacy providers following in that suit. So, we see a wide-open market to fill-in that gap.”

JAMES BENOIT
CHAIRMAN AND CO-FOUNDER, INVENTURE

“With Allvue, we’ve taken the first step in establishing a modern architecture that is needed to run multiple funds across two strategies and to continue growing.”

JOACHIM SATCHWELL
ASSOCIATE DIRECTOR, POLARIS

“The flexibility of Allvue’s software has helped support AlbaCore’s significant AUM growth from \$1B in 2017 to \$9B in 2021.”

TARA MULHOLLAND
HEAD OF BUSINESS TRANSFORMATION, ALBACORE CAPITAL GROUP

“Allvue’s deep fund accounting experiences was invaluable in getting our first fund up and running.”

MATT SMITH
CHIEF ACCOUNTING OFFICER, ATLANTIC PACIFIC COMPANIES

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ATLAS | HOLDINGS



Inventure

MEPcapital

PERMIAN



ABOUT CARTA



Carta build software to help companies, investors, law firms, and employees modernize the way they manage ownership. Carta is modernizing and revolutionizing the way private companies manage and interact with their share and option holders. They are bringing stock certificates and options onto the cloud and into the 21st century. Companies can easily issue stock certificates individually or in bulk, and shareholders can receive and view their shareholdings across all private companies on one screen.

258

TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“Carta is kind of a one-stop-shop solution for companies, especially companies that are within our niche. I think Carta offers a solution that encompasses everything they need from a capitalization management perspective.”

RONALD PIERRE
VICE PRESIDENT, GROWTH CAPITAL, KAYNE ANDERSON

“Tactyc has data points that we have always reported but are now there in an easier-to-access, more consolidated way. I can respond way more quickly to questions that we get frequently from both our GPs and LPs.”

MARK PETTIT
CHIEF FINANCIAL OFFICER, CONNECT VENTURES

“Carta provides transparency into all of our data. I can look at any given second and know that it's up to date in real time, not from three months ago or the last quarter-end.”

JARRED MORALES-MCKINZIE
DIRECTOR OF FINANCE, BASE10

“Tactyc was light years ahead of our prior Excel-based solution, or anything we had seen in the market.”

LAUREN DELUCA
CO-FOUNDER AND GENERAL PARTNER, MOTIVATE VENTURE CAPITAL

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ABOUT FIS



FIS is a financial technology company providing solutions to financial institutions, businesses, and developers. We unlock financial technology to the world across the money lifecycle underpinning the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients to confidently run, grow, and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses of all sizes adapt to meet the needs of their customers by harnessing where reliability meets innovation in financial technology. Headquartered in Jacksonville, Florida, FIS is a member of the...

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“With FIS’ ecosystem of fund accounting and administration technology, we have a future-proof and scalable suite of solutions that will support our business growth into new asset classes and currencies, increase operational efficiencies, and enhance controls. The integration between our fund accounting and reconciliation systems will also help ensure compliance with local regulations.”

LARS HØJBERG
HEAD OF IT, SPARINVEST

“The solution had the scope, speed and flexibility that we needed to support this key business. Having worked with them for many years now we knew we could rely on them to deliver, and we have not been disappointed.”

WERNER BESENFELDER
HEAD OF EQUITY DERIVATIVES TRADING, LBBW

“FIS has been a great partner for us. They’ve been responsive. They’ve been creative. They’ve looked at products and helped us get to a point we believe we need to be in the marketplace.”

TOM ORMSETH
SVP OF RETAIL STRATEGY, WINTRUST

“It has enabled us to integrate multiple systems, minimize redundant applications and reduce associated costs. Additionally, it has enhanced communication with our customers.”

BOBBY EVARTT
CHIEF INFORMATION OFFICER, TRINITY BANK

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virgin atlantic



LVMH





ABOUT SS&C TECHNOLOGIES



SS&C provides the global financial services industry with a broad range of highly specialized software, software enabled-services and software as a service (SaaS) solutions for operational excellence. SS&C has been helping investment and financial firms of all types gain that advantage for more than 30 years. Grounded in their deep knowledge and understanding of your business, their technology-powered solutions and services help you run your operations more efficiently, compete more effectively and grow more profitably.

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“We had to collaborate across the board to get this implemented quickly. We worked with the providers and health centers, got telemedicine in place, and ensured a call-in number for members with follow up questions to reach a nurse. It was all hands on deck.”

SONIA MUNN
DIRECTOR OF CARE MANAGEMENT, JOHNS HOPKINS
MEDICINE

“We chose SS&C as our partner to provide a solid foundation for our employees and because of their ability to drive cost efficiencies in the fund administration business. Their global expertise and technology allowed for a smoother transition for our administrative team to reside within SS&C.”

VASYL NAIR
CHIEF EXECUTIVE OFFICER, MINE SUPER

“The best solution we saw was SS&C with Vision FI. I didn't see another provider with a solution in the market that could satisfactorily answer the question 'How would you help me reproduce this client report?' No one else could do it.”

CAMERON PRICE
CHIEF OPERATING OFFICER, VANTAGE INFRASTRUCTURE

“In my many years as a COO, I feel that changing fund administrators was the best decision I have made for our fund. My relationship with the SS&C team goes beyond a typical vendor relationship to more of a partnership.”

MARAYART TEERATOMORN
CHIEF OPERATING OFFICER, NTASSET

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**2026
FUND
ADMINISTRATION
SOFTWARE**

TOP PERFORMER





ABOUT EFRONT



eFront is the leading technology solution for alternative investment management, covering the needs of all alternative investment professionals end-to-end, from fundraising and portfolio construction to investment management and reporting. With more than 850 clients in 48 countries, eFront services clients worldwide across all major alternative asset classes.

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TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“eFront ERM Control covers all the components of the control device and offers a multitude of functionalities allowing extended operation and stand-alone use. The solution simplifies and digitizes the management of the control system in line with our current working methods.”

SENIOR INTERNAL CONTROL OFFICER
LARGE PROPERTY AND CASUALTY INSURANCE COMPANY

“The technology we use is extremely important to our clients. eFront helps BBH be a technology leader in the fund administration market.”

CHRISTOPHER MCCHESENEY
SENIOR VICE PRESIDENT ALTERNATIVE FUND SERVICES,
BROWN BROTHERS HARRIMAN

“eFront Invest helped us keep track of our portfolio and keep the numbers correct all the time.”

TROND KNUTSEN
SENIOR ASSOCIATE, ARGENTUM FONDSINVESTERINGER

“Using eFront we were able to reach significant productivity gains.”

DANNY BROUILLARD
MANAGING DIRECTOR, CORDIANT

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ABOUT FINARTIS



FINARTIS is a leading Swiss software publisher helping Private Banks, Family Offices and Asset Managers worldwide serve their clients better. FINARTIS's out-of-the-box digitally enhanced investment management solutions implement fast and securely. They help improve front office productivity to bring more value-added services to clients while reducing operating costs through intelligent, automated straight through processes and real time accounting of all operations. FINARTIS's flagship product, Prospero365, is an integrated suite of financial applications dedicated to Wealth...

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TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“ We chose to partner with FINARTIS again after a careful selection process for our Private Bankers in terms of mobility, user experience, extensiveness and caliber of service. Since our Trust Banking Group was already using Prospero Suite, we found it a natural extension for our Private Banking Business. This project with FINARTIS is in line with UnionBank’s digital transformation... ”

JOSE EMMANUEL U. HILADO
CHIEF FINANCIAL OFFICER, TREASURER AND SENIOR EXECUTIVE VICE PRESIDENT, UNIONBANK

“ We work with several banks and, as we grew, gathering accurate data from all these counterparts in a disciplined manner was becoming a problem. Prospero, which is plugged into our counterparts back offices, enables us to get a booking system which is updated automatically and on a daily basis. Prospero avoids spending time and reduces mistakes related to manual... ”

BABY PALLIPADAN
HEAD OF THE RUWENZORI INVEST LIMITED FAMILY OFFICE, RUWENZORI INVEST LIMITED FAMILY OFFICE

“ Our company has invested in a specialized system, through its effort to offer the best service possible in Mutual Funds. The field of Mutual Funds is developing at a fast pace in Cyprus and Treppides Fund Services Ltd, as a leading service provider in the field, remains dedicated in its efforts for continuous reinvestment, both in the software and human elements, in order to maintain its development as the leading Administrator of Investment... ”

ANDREAS YIASEMIDES
PARTNER, TREPPIDES FUND SERVICES LTD

“ We chose to partner with FINARTIS after a thorough selection process in terms of automation, user experience, and productivity for our Treasury Sales relationship managers and investment banking expertise. Our partnership with FINARTIS will be instrumental to our success as we stay committed to continuous growth through innovation. ”

ROBERT LEHMANN
PRESIDENT, AMALGMATED INVESTMENT BANCORPORATION

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ABOUT FUNDCount

FundCount

FundCount offers portfolio managers, accountants and fund administrators powerful tools for investment management and partnership accounting. Investment and accounting professionals who serve institutional investors and ultra-high net worth families have relied on FundCount to help manage their operations for over 10 years. FundCount's integrated system streamlines portfolio and partnership accounting – offering higher levels of efficiency to operations and immediate and actionable information for firms and their clients.

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“FundCount freed up our time spent updating the database and made the process far less prone to human error. Now we can trade when the market blinks without dreading tomorrow’s data entry.”

INVESTMENT ANALYST
HORSEFERRY TRADING

“Thanks to FundCount, Protege has been able to easily support more clients and funds. We have grown sixfold in the last two years and expect double-digit growth going forward.”

HENRY YOUNG
CHIEF EXECUTIVE OFFICER, PROTEGE FUND SERVICES

“FundCount gives us more control and it helps us identify things that we otherwise would not have been able to identify.”

FIRM PARTNER
NEW YORK CITY-BASED HEDGE FUND COMPANY

“We never anticipated that a software solution could make us even more efficient, but FundCount did just that.”

MARCIE ODUM
CFO, THE LUPTON COMPANY

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HATCHER+

MGCapital

FAFUNDASSOCIATES

TFOPHOENIX
THE FAMILY OFFICE



ABOUT JUNIPER SQUARE

Juniper Square

Juniper Square empowers GPs and LPs to focus on building enduring relationships and exceptional investment opportunities. Our modern investment lifecycle management solutions empower GPs and LPs to connect and communicate seamlessly across every interaction—from fundraising and investor operations to fund administration. Free your firm from the disjointed and siloed systems, operations, and processes keeping you from realizing the full potential of your partnerships. Purpose-built for the private markets, Juniper Square supports commercial real estate, private equity, and venture capital firms of all sizes, regardless of the number of...

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“Juniper Square is one of the best investments we’ve made for our company. We’re very happy that we implemented the software early on. It’s rare to find something that can offer a best-in-class experience for both managers and investors.”

SCOTT SHERMAN
CO-FOUNDER AND MANAGING PRINCIPAL, TRICERA CAPITAL

“Our experience so far with Juniper Square’s open-end fund capabilities has been terrific. From processing distributions and redemptions, to communicating with our investors, everything is much more streamlined and straightforward.”

KELLY LYNCH
SENIOR ADVISOR, BERNSTEIN

“We needed a fund administrator who believed in that same approach because, ultimately, our internal teams’ experience as GPs has a ripple effect on the experience of our investors.”

CAMI MILLER
VP OF STAKEHOLDER EXPERIENCE, SATORI CAPITAL

“Every interaction with an LP is an extension of your brand. We aim to delight LPs with the investor experience, and we needed a portal that delivered that.”

KATIE RIESTER
MANAGING DIRECTOR & GP OF FUND OF FUNDS INVESTING, FELICIS

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ABOUT TEMENOS

temenos

We were founded in 1993 and set on a mission to revolutionize banking. Since then, our community of customers, partners, influencers, and employees has grown. Back in 2002, we celebrated signing our 300th client, and today we serve 3000 customers. Two-thirds of the world's top 1,000 banks and 70+ challenger banks in more than 150 countries rely on our technology. Our open platform enables over 1.2 billion people to carry out their daily banking needs. That's 30% of the world's banking population. Banking providers – big and small, traditional and new – use our platform to build new...

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TOTAL CUSTOMER REFERENCES

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FEATURED TESTIMONIALS

“With Temenos Payments, Hamilton Reserve Bank now has the capabilities to offer fast cross-border payments to its global clientele. We process millions in client transactions every year”

CLAIRE ROBINSON
SENIOR COMPLIANCE AND RISK OFFICER, HAMILTON RESERVE BANK

“Temenos is a great partner for us to help that rapid cycle of products iteration, gaining insights and be able to continue to deliver solutions that solve real pain points for consumers.”

COLIN WALSH
FOUNDER & CEO, VARO

“Temenos has the technology and the partner ecosystem to empower organizations in competitive markets to differentiate themselves effectively, and we can't recommend them highly enough”

FRED COOK
CHIEF INFORMATION OFFICER, BLUESHORE FINANCIAL

“With Temenos, we know that it's possible to launch fast and scale quickly”

FRANK TROTTER
PRESIDENT AND BOARD MEMBER, BATTLE BANK



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**2026
FUND
ADMINISTRATION
SOFTWARE**

RISING STAR





ABOUT BRITECH



BRITech is a British/Brazilian FinTech SaaS company headquartered in Sao Paulo, Brazil, with 70 employees in offices in eight countries. They provide scalable, robust wealth management software, professional services and end-to-end technology for investment firms, asset managers, brokers, fund administrators and wealth managers. Their customized, enterprise-class solutions help the investment management community navigate the complex and ever-transitioning environment of shifting investor preferences, regulatory mandates and emerging technologies.

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TOTAL CUSTOMER REFERENCES

**VIEW ALL
REFERENCES**

FEATURED TESTIMONIALS

“BRITech proved to exceed our expectations from the very beginning of our engagement with them and it soon became clear that they would be our ideal partners.”

ALBERTO SPAGNOLO
CHIEF EXECUTIVE OFFICER, VARIANZA

“We chose BRITech as our Technology partner because they have an experienced team and we know we can count on the team at any time.”

MARCELO COUTINHO
OPERATIONS MANAGER, ICATU - VANGUARDA

“Having BRITech as a partner in an increasingly competitive market is of paramount importance for a new company like ours.”

CRISTIANO ALMUDI
DIRECTOR OF RISK AND COMPLIANCE, VANQUISH

“BRITech's trust, experience and reputation were decisive factors in choosing the solution.”

HENRY GONZALEZ
SHAREHOLDER AND MANAGER, FRAM CAPITAL

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MAIC.be



Dyrberg Invest



ABOUT FUNDWAVE



Fundwave is providing Software-as-a-Service for alternative funds such as Private Equity Funds, Venture Capital Funds, Real Estate Funds and Fund of Funds. Fundwave's flagship fund administration software can allocate numbers between your LPs, generate capital notices and NAV statements, automatically generate journals and financial reports, and help you create beautiful drag and drop visuals for your presentations.

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TOTAL CUSTOMER REFERENCES

[VIEW ALL REFERENCES](#)

FEATURED TESTIMONIALS

“We have used Fundwave for a number of years now for our Fund and Investment management. Administration tasks are very simple and intuitive especially investments across multiple funds and revaluations. What sets this solution apart from other enterprise software products is the support we receive from the team. They are extremely responsive and attentive to the client's needs.”

CRAIG HOLDEN
CHIEF FINANCIAL OFFICER, TIDAL VENTURES

“I am very grateful that as a VC firm we have decided to invest in a fund admin package like Fundwave. It is feature rich on the fund admin side, the level of reporting and querying of data is fantastic, and their customer support team is super responsive. I can't believe that other firms are using spreadsheets for this kind of work!”

VELA GEORGIEV
CHIEF OPERATING OFFICER & OPERATING PARTNER,
TENACIOUS VENTURES

“Fundwave combines the best parts of other products on the market.”

MARTIN'O REGAN
MANAGING DIRECTOR, SOLAS FIDUCIARY SERVICES

“Very nice module. Love the new dashboards.”

MARCEL NEUTEL
MANAGING PARTNER, C4D PARTNERS

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ABOUT SIMCORP



SimCorp provides integrated, best-in-class investment management solutions to the world's leading asset managers, fund managers, asset servicers, pension and insurance funds, wealth managers and sovereign wealth funds. Whether deployed on premise or as an ASP solution, its core system, SimCorp Dimension, supports the entire investment value chain and range of instruments, all based on a market-leading Investment Book of Record. SimCorp invests more than 20% of its annual revenue in R&D, helping clients develop their business and stay ahead of ever-changing industry...

200 TOTAL CUSTOMER REFERENCES

VIEW ALL REFERENCES

FEATURED TESTIMONIALS

“The greatest business advantage for BMO is that the IBOR provides the most up-to-date position data to drive better portfolio and trading decisions. At all times, the IBOR contains full, accurate information on which our portfolio managers can make investment decisions and traders can trade. The risk of wrong decision-making based on incorrect data is simply too high to continue being ignored.”

TODD HEALY
HEAD OF INVESTMENT OPERATIONS, BMO GLOBAL ASSET MANAGEMENT

“Within the front office, the real-time total portfolio is very helpful because it is a very easy screenshot of everything we own. So when the portfolio managers look at their screens, they know exactly what they own, in one view.”

CLAUDIA GOURDE
PARTNER, GENERAL COUNSEL AND COO, PINESTONE ASSET MANAGEMENT

“Looking into how SimCorp is best able to support Forca on this big change journey we are going into is guiding us as a client to what are the market standards in order for us to best support our clients, but also understanding the business we are in and the drivers within that business.”

CHRISTINA LARSEN
HEAD OF FUND MANAGEMENT, FORCA

“We play an important role in gathering data from all our vendors, settling and reconciling the trades, pricing the funds and making sure our operations are running smoothly 24/5.”

ARNE MARTIN MOEN
HEAD OF INVESTMENT ADMINISTRATION, STOREBRAND

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