

Zephyr Platform Case Study: Qualis Capital

Zephyr 
Informa Financial Intelligence

Qualis Capital is a financial services platform offering a marketplace for private alternative investments. Their cloud-based asset allocation platform provides access to curated alternative investments, generally at lower minimums, and at institutional pricing. Investors can research and select from a diverse menu of vetted investment managers.

Qualis' cloud-based asset allocation platform enables wealth managers to research and select from a diverse network of alternative investment advisers and their private funds, while providing direct access to exclusive quality alternative investments at lower minimums and institutional pricing.

With their partnerships, the Qualis platform provides both high level and deep analytics to assist in investment selection as well as provides additional tools for on-going due diligence.

Why Zephyr?

Qualis Capital has been a client since 2020 and subscribes to the Zephyr platform.

Robert Pereira is the Managing Director of Research for Qualis Capital and is responsible for researching alternatives for consideration in their platform, comparing alternatives to their peers, and comparing alternative performance for their clients.

Qualis Capital needed a robust analytics and reporting platform to help power in-depth research of their managers and produce sleek, yet informative client communications. "I have been using Zephyr close to 20 years," said Mr. Pereira, "it is the easiest way to find and analyze returns."

As with their managers, Qualis vetted several analytics and reporting solutions prior to choosing Zephyr. "We did look at several others, but this (Zephyr) is what works best for us right now," said Mr. Pereira. He went on to say, "It is a solution that I am comfortable with and found I was able to

produce actionable research quickly and easily, saving me time."

In addition to the solution, Mr. Pereira has had an exceptional experience with the Zephyr services team. Per Mr. Pereira, "In my sessions with client services, I have found them to be very helpful."

Mr. Pereira has been happy with his experience with Zephyr and would recommend it to others. He said, "I would recommend Zephyr. As we grow Qualis Capital, we will also continue to expand our relationship with Zephyr."

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**ROBERT PEREIRA, MANAGING DIRECTOR OF RESEARCH
AT QUALIS CAPITAL**