

June 16, 2026



SEI Introduces Technology and AI to Boost Investment Manager Efficiency

Unified Platform Built to Transform Data Access, Transparency, and Operational Scale for the Future of Investment Management

OAKS, Pa. and LONDON, June 16, 2026 /PRNewswire/ -- [SEI](#)® (NASDAQ: SEIC) today announced a significant investment in the technology roadmap for public and private market investment managers with the introduction of an enhanced, unified platform that improves data access, insights, and operational efficiency. The improved manager experience combines SEI Data Cloud, the firm's centralized data foundation, with SEI Scope™, a next-generation manager portal that brings workflows, analytics, and oversight together through intuitive, near real-time visualizations.

Built in close collaboration with global investment managers, the platform experience spans the full operational lifecycle, transforming how investment managers interact with their data and service teams. SEI Data Cloud provides a secure, scalable data foundation that ensures governance and accuracy, while SEI Scope builds on that foundation to deliver actionable insight through configurable workflows, analytics, and digital NAV drill-down capabilities. Together, they power consistent reporting, configurable automation, and unified transparency that offers:

- **Faster, more reliable NAV delivery** through automated NAV packages, embedded quality control checks, and reduced manual reconciliations.
- **Improved transparency and collaboration**, giving managers end-to-end visibility into workflows and operational status.
- **Streamlined operations** to expand process automation and accelerate efficiency
- **Deeper insights from near real-time data**, enabling stronger decision-making based on current, explainable information rather than static reports.

Alongside these enhancements, SEI continues to invest across its investment managers technology ecosystem, implementing Fenargo's CLM platform to streamline AML, KYC, and client and investor onboarding processes. SEI also introduced integrated waterfall calculation and scenario analysis tools that connect directly to live fund data, enabling managers to model distributions in real time and gain clear insight into how operational decisions drive investor returns.

Additionally, SEI recently launched [SEI Access™ for CITs](#), an automated collective investment trust (CIT) onboarding platform featuring intelligent data capture, digitized application documents, collaborative dashboards with real-time updates, seamless integration with SEI's existing CIT platform, and the ability to add alternative CIT funds to SEI Access for expanded market reach.

Commenting on the enhancements, Phil McCabe, Head of SEI's Investment Managers business, said:

"Investment managers are facing growing pressure to do more with greater speed, precision, and transparency, but the answer isn't more people or spreadsheets—it's smarter use of data, AI, and automation to create opportunities for higher-value work like strategic advisory and client engagement. SEI has a deep history of investing in its technology platform to deliver world-class experiences, and the operational efficiency gains become the foundation for future innovation in solutions like SEI Data Cloud and professional services that help our clients grow.

"By continuing to invest in a unified data foundation, intelligent workflows, and automation grounded in strong governance and safety, we're helping managers shift from static reporting to continuous insight while maintaining accuracy, control, and human oversight. The result is technology designed to reduce complexity and help firms move faster, reduce friction, and scale with confidence without compromising oversight or service quality."

Chris Edwards, Head of Client Enablement for SEI's Investment Managers business, added:

"These investments reinforce our long-standing commitment to building a scalable, intelligent operating model that managers can trust. Through AI-enabled and agentic automation and tightly integrated platforms, we are making the intricacies of investment operations more manageable, embedding data controls and transparency directly into the technology so our clients can operate more efficiently today and be prepared for what's next."

In addition to platform enhancements, SEI has also been making strategic investments across the enterprise to modernize how it operates, innovates, and delivers value to clients through AI and automation. Earlier this year, the company announced it had joined forces with IBM [to accelerate enterprise transformation through agentic AI and automation](#), which includes a core focus on collaboration with SEI's Investment Managers business to enhance investor servicing and alternative fund accounting operations.

About SEI®

SEI (NASDAQ: SEIC) is a leading global provider of financial technology, operations, and asset management services within the financial services industry. SEI tailors its solutions and services to help clients more effectively deploy their capital—whether that's money, time, or talent—so they can better serve their clients and achieve their growth objectives. As of March 31, 2026, SEI manages, advises, or administers approximately \$1.9 trillion in assets. For more information, visit seic.com.

About SEI's Investment Managers business

SEI's Investment Managers business provides advanced operating infrastructure for investment organizations of all types to evolve and compete in a landscape of escalating business challenges. SEI's global operating platform delivers customized and integrated

capabilities across a wide range of investment vehicles, strategies, and jurisdictions to investment managers and asset owners. The company's services enable users to gain scale and efficiency, keep pace with marketplace demands, and run their businesses more strategically. For more information, visit seic.com/ims.

Forward-looking statements

This communication contains forward-looking statements within the meaning of the rules and regulations of the Securities and Exchange Commission. In some cases, you can identify forward looking statements by terminology, such as "may," "will," "expect," "believe," "can," "continue," "seek," or similar expressions. SEI's forward-looking statements include its current expectations as to:

- the benefits that clients may derive from SEI's platform;
- SEI's ability to continue investing in its technology, data, AI, and automation capabilities to support long-term operational effectiveness for clients;
- the anticipated impact of SEI's AI initiatives on client experience, operational performance, and service delivery; and
- the degree to which SEI's strategic technology investments may support future growth, innovation, and value creation for SEI and its clients.

You should not place undue reliance on any forward-looking statements, as they are based on the current beliefs and expectations of management and are subject to significant risks and uncertainties, many of which are beyond management's control or are subject to change. Although management believes the assumptions upon which the forward-looking statements are based are reasonable, they could be inaccurate. Some of the risks and important factors that could cause actual results to differ from those described in SEI's forward looking statements can be found in the "Risk Factors" section of SEI's Annual Report on Form 10 K for the year ended Dec. 31, 2025, filed with the Securities and Exchange Commission. **SEI undertakes no obligation to update or revise any forward looking statements, whether as a result of new information, future events, or otherwise.**

Company Contact: **Media Contact:**

Alicia Rudd

Eric Hazard

SEI


Vested

+1 610-676-3887

+1 917-765-8720

arudd@seic.com

eric@fullyvested.com

 View original content: <https://www.prnewswire.com/news-releases/sei-introduces-technology-and-ai-to-boost-investment-manager-efficiency-302800658.html>

SOURCE SEI Investments Company