

End-to-End Lending Solutions

for ClearPar Clients



S&P Global

Market Intelligence

As a ClearPar client, you have access to a wide range of trusted lending solutions that enable you to streamline or outsource key elements of the loan trade lifecycle, including settlement, reporting, agent notice management, loan reference data, reconciliation, and compliance.

We invite you to explore the additional high-value data and services that are available to you through data and workflow tools, managed services, and outsourcing.

Industry-leading technology, data, and services



16 million+
Loan Transfers Settled



18 trillion+
Notional Settled



20,000+
Active Legal Entities



200+
Institutions
Electronically
Integrated

ClearPar Reporting

ClearPar Premium Reporting gives you access to trade reports and previously unrealized datasets, trade statuses, and tracking capabilities.

- Identify open trades losing delayed compensation before they close.
- Track trade economics in real time across open and settled trades.
- Download detailed reports on trades, including real-time updates on credit holds, signatures, settlement dates.
- Track settlement performance, including T+ analysis for primary and secondary trades.

ClearPar integration

Nearly 200 institutions, including buy-side, sell-side, agent and service provider clients, rely on ClearPar integration to optimize their post-trade workflow.

ClearPar integration enables you to deliver trades and initiate the settlement process sooner, automate allocation across your fund entities, perform key trade actions such as e-signing, approving settlement, and entering timelines and consuming settlement details such as purchase price, delayed compensation, fees, and more.

Notice Management and Trade Settlement

Optimize your operations with ClearPar services and data that enhance accuracy, deliver insight, and enable you to scale up smoothly.

Notice Manager

Streamline the workflow and meet your research and audit needs with access to historical information. Notice Manager offers workflow and collaboration tools that optimize front- and back-office operations, including data dissemination, and retrieval for multiple formats.

Trade Settlement

Outsource loan settlement to the expert WSO Middle Office Services team for a full trade management solution that's scalable, efficient, reliable, and timely. Services leverage S&P Global reference data, portfolio management, loan platforms, and more.

Loan Reference Data

Run credit analysis, fuel performance attribution, manage compliance and risk, and identify new investment opportunities with best-in-class data sourced directly from executed credit agreements, funding memos, agent notices, and public filings.

Loan Management Outsourcing

Reduce the burden of managing loan trading volumes and positions at scale. Outsource your middle- and back-office loan operations to industry experts supported by best-in-class loan reference data and world-leading WSO software. Our team offers loan administrative services, trade closing services, cash and position reconciliation services, outsourced CLO compliance, online document management for agent notices and agent services.

Regulatory and Compliance

New CLO investment?

Our **CLO Startup Solution** helps new loan portfolios launch quickly and confidently with integrated data, workflow and aggregation that streamlines the credit management process end-to-end.

Built on Counterparty Manager, the industry standard solution for managing the onboarding workflow by sharing client, tax, regulatory, and constitutional documents and data between counterparties, S&P Global regulatory and compliance solutions enable ClearPar clients to deploy capital faster, decrease costs, and build capacity while meeting regulations and managing risk.

Managed Services

Scale up sustainably

From data-driven, tailored advisory services that deliver insight to dedicated managed processes for regulatory workflows to augmented services models for capacity creation, our expert teams help you scale up and seize new opportunities.

Onboarding Accelerator

Accelerate compensation

Prevent the loss of primary delayed compensation due to KYC with a streamlined onboarding solution that covers entity data, document collection, KYC and tax profile validation, regulatory protocols and self-regulations, and legal and credit agreements.

Tax Solutions

Limit tax withholdings

Scale and streamline tax compliance processes with outsourcing and technology solutions that include onboarding and tax validation software, compliance advisory services, and managed services for tax form validation.

About S&P Global Market Intelligence

At S&P Global Market Intelligence, we understand the importance of accurate, deep, and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

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