



AIMA have partnered with global managed IT services provider, Eze Castle Integration, to survey IT strategy and spend allocation of investment firms around the globe, in response to the rapid adoption of digitalisation. This survey specifically looks to gather insights around IT strategy for the future pertaining to hybrid/remote working, data and outsourcing.

Participants will have the opportunity to enter a prize draw to win an iPad as well as a complimentary IT health check with Eze Castle Integration.

1. Where is your firm headquartered?

- EMEA (excl. UK)
- UK
- USA
- Canada
- Australia
- Hong Kong
- Singapore
- Japan
- Asia-Pacific (other)
- Other (please specify)

2. What is your total hedge fund AUM?

- Less than \$100mm
- \$100-\$500mm
- \$500mm-\$1bn
- \$1-\$5bn
- \$5-\$10bn
- \$10-\$20bn
- \$20bn+

3. What description best fits the strategy of your main hedge fund? (more than one category may be selected, if applicable)

- Long Only
- Equity: Long/Short
- Equity: Market Neutral
- Dedicated Short
- Relative Value: Fixed Income Arbitrage
- Relative Value: Convertible Arbitrage
- Relative Value: Volatility Arbitrage
- Event Driven: Distressed/Restructuring
- Event Driven: Risk Arbitrage/Merger Arbitrage
- Event Driven: Equity Special Situations
- Credit Long/Short
- Credit Direct Lending
- Credit Distressed
- Structured Credit/CLO
- Credit Asset Based Lending
- Macro
- Managed Futures/CTA: Fundamental
- Multi-strategy hedge fund
- Sector Bias
- Emerging Markets
- Fund of Funds
- Sector Dedicated
- Capital Structure Arbitrage
- Other (please specify)

4. If any, which of the following functions do you currently outsource? Please select all that apply.

- IT
- Compliance
- Legal
- Risk
- Tax
- Other (please specify)

- None of the above

5. Please select the approach that most accurately reflects your strategy to future proof your IT infrastructure.

Please Select One

- Use existing resources
- Hire new full-time resources
- Hire contingent labour/staff augmentation
- Outsource specific functions where expertise is lacked
- Outsource the entire IT function
- No strategy in place
- I do not know
- Other (please specify)

6. If any, which of the following areas are you looking to outsource and how much are you looking to spend?

Please select all that apply.

- Cybersecurity
- Data services
- Systems integration
- Process automation
- Application development
- Other (please specify)

- None of the above

7. How much are you looking to spend on the outsourced service(s) you picked above?

- Less than \$100,000
- \$100,000 - \$250,000
- \$250,000 - \$500,000
- \$500,000-\$750,000
- \$1 million +
- I do not know
- None
- Other (please specify)

8. How confident are you that your IT infrastructure currently effectively supports the use of artificial intelligence and machine learning within your firm? Please indicate using the scale below.

- Very confident
- Somewhat confident
- I do not know
- Somewhat uncertain
- Very uncertain

9. If at all, please quantify the investment your firm is looking to make in 2021 on machine learning and artificial intelligence initiatives? Please select one

- Less than \$100,000
- \$100,000 - \$250,000
- \$250,000 - \$500,000
- \$500,000-\$750,000
- \$1 million +
- I do not know
- None
- Other (please specify)

10. When government guidelines permit us back to the office, which of the following working models is your organisation planning to deploy? Please select one.

- Completely on-site
- Completely remote
- Hybrid (onsite and remote)
- Yet to be decided
- I do not know

11. To support remote working, will you be utilising any of the following? Please select all that apply.

- Virtual deal rooms
- Online due diligence platform
- Deal sourcing platform
- Virtual fundraising platform
- Other (please specify)

- None of the above

12. What are you doing to manage the added cyber risks and vulnerabilities that come with operating your business remotely? Please select one.

- Managing cybersecurity in-house
- Outsourced cybersecurity to one vendor
- Engaging with multiple vendors on cybersecurity
- None of the above
- I do not know
- Other (please specify)

13. What dictates your return to the office strategy? Please select all that apply.

- Technology
- Operations
- Lack of collaboration tools
- Investment style
- Other (please specify)

- None of the above

14. Are you remaining on-premise, in a private cloud or migrating to the public cloud? Please select one.

Current Situation:

- On-premise
- In a private cloud
- Migrated to the Public Cloud
- I do not know
- Other (please specify)

15. Are you remaining on-premise, in a private cloud or migrating to the public cloud? Please select one.

Plan:

- Staying Here
- Migrating to a private cloud
- Migrating to the public cloud
- Moving to on-premises
- I do not know
- Other (please specify)

16. If at all, which elements of your cybersecurity are you looking to bolster this year? Please select all that apply.

- Dark Web Monitoring
- SIEM
- Vulnerability Management
- Outsourced Policy Creation
- Other (please specify)

- None of the above

17. With remote working come considerations around compliance. How often does your firm update its business process and IT policies? Please select one.

- Monthly
- Quarterly
- Annually
- I do not know
- Other (please specify)

18. Has your business considered any digital transformation project(s) this year? Please select one.

- Yes
- No
- I do not know

19. What is the driving force behind these project(s)? Please select one.

- Modernization
- Better user experience
- To streamline your business operations
- I do not know
- Other (please specify)

20. Does your firm have a data strategy in place? (Data warehouse/Data lake) Please select one.

- Yes, we have a data warehouse
- No, but we are considering it
- Other, please specify
- None of the above
- I do not know

21. To be entered in the prize draw to win an iPad as well as a complimentary IT health check with Eze Castle Integration, please enter your details below.

(Disclaimer: details submitted will be shared with Eze Castle Integration.)

First Name

Last Name

Company Name

Job Title

Country

Email Address

Phone Number