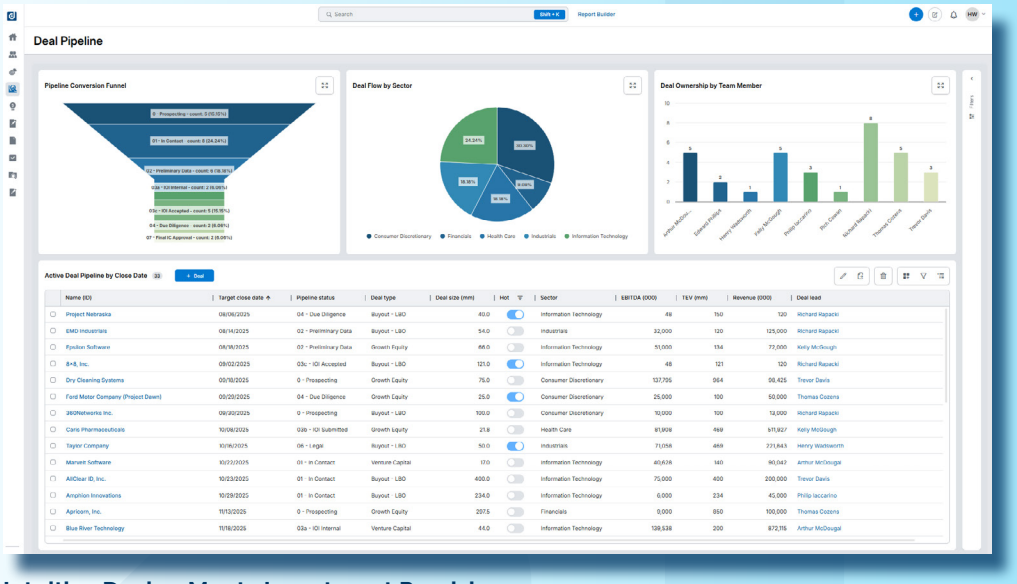
Dynamo Deal Management v3.0

Take Your Deal Management to the Next Level

Revolutionize Your Workflow, Maximize Your Success

Deal Management Made Simple.



Intuitive Design Meets Investment Precision

Dynamo Software's all-in-one **deal management solution** empowers investment teams to build stronger relationships, source higher-quality deal flow, and conduct deeper diligence with speed and confidence. From pipeline to portfolio, Dynamo delivers the intelligence and efficiency needed to close more deals, faster—turning insight into investment advantage.

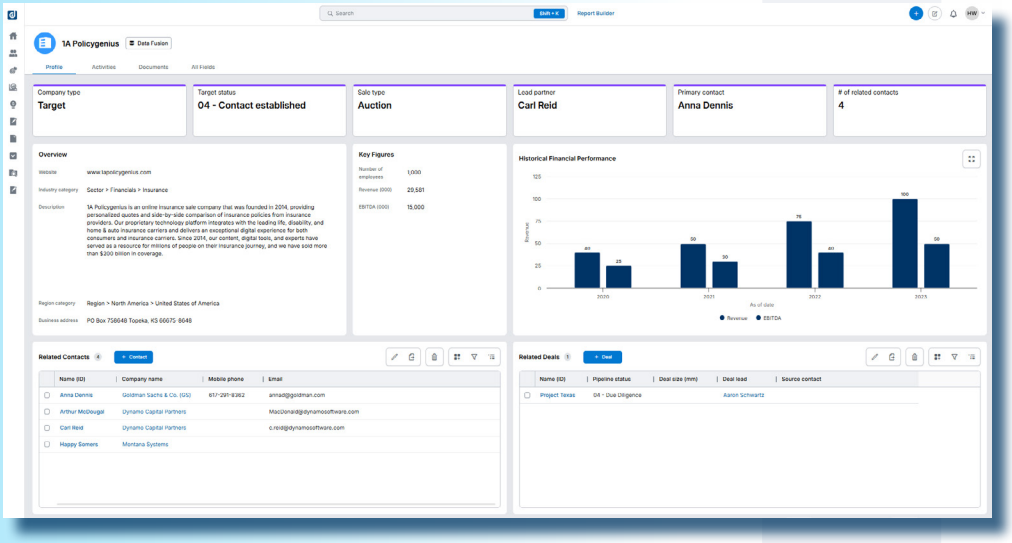
Take control of your pipeline with a modern, intuitive interface and expertly-designed layouts that simplify workflows and accelerate decision-making.

- **Next-Gen Interface Innovation** | A fully redesigned, intelligent interface delivering a clean, adaptive user experience tailored for finance and investment professionals.
- **Unified Deal Tracking** | Centralize all deal communications, research, and relationships in one secure platform for improved collaboration and visibility from pre- to post-investment.
- **AI Insights** | Gain actionable insights with DynamoAI summarization from meeting notes and documents to boost productivity.
- **Informed Investments** | Simplify access to critical deal insights, saving time and ensuring enriched decision-making through integration with top data sources.
- **Built-In Compliance** | Ensure regulatory readiness with integrated compliance features supporting SEC, GDPR, and audit trail standards.
- **Integrated Workflow** | Integration with Outlook and Gmail to manage interactions and activities directly from your inbox for streamlined workflows.
- **Out-of-the-Box Layouts & Reports** | Expert-designed, pre-configured layouts and reports crafted to enhance the Dynamo experience. Ready for immediate use, these tools can jumpstart users' workflows or can be tailored to meet any unique business requirement.

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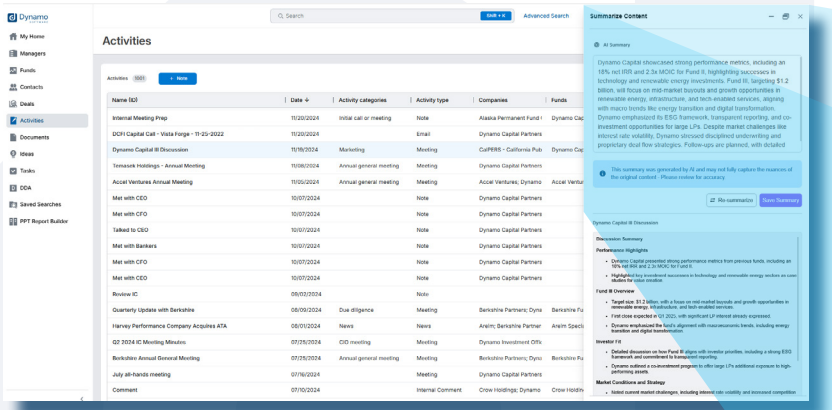
Deal Management Solution Designed to Elevate How You Work

Empower Your Team, Optimize Workflows, and Gain a Performance Edge



Deeper Insights with AI

- Augment research and data processes with DynamoAI capabilities for intelligent data tagging.
- Quickly uncover key insights with automated AI summarization of documents and meeting notes.



Connected Systems and Automation

- Boost your investment strategies with intelligent automation from Dynamo, seamlessly integrating data from platforms like PitchBook, Preqin, and FactSet to power faster, more informed decisions.
- Streamline your workflow with Outlook and Gmail integration for easy email, calendar, and document sharing.
- Automate data management and reporting workflows with Dynamo's PowerPoint Report Builder, using pre-built templates that auto-populate deal data across entities for audit-ready presentations.
- Seamlessly connect your existing systems with Dynamo's built-in integrations and open API, designed to be your central hub for efficiency.

Benefits

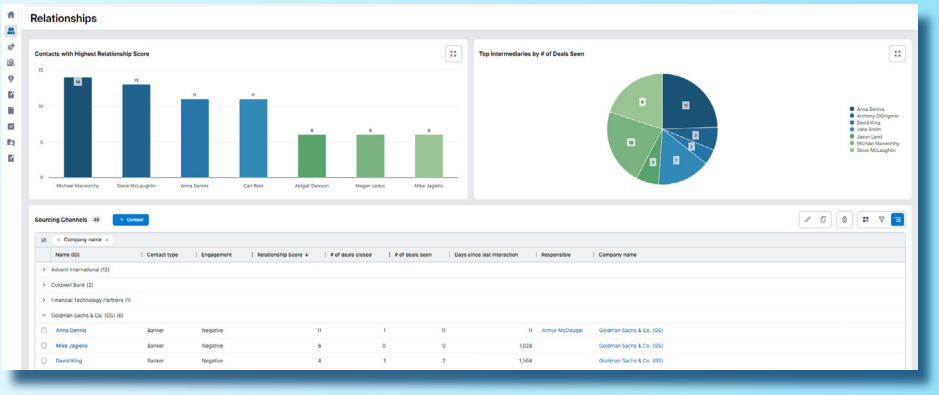
End-to-End Deal Visibility

- Track every step of your deal lifecycle from initial research to post-investment.
- Gain real-time visibility of all-deal related communications and relationships across the team.
- Use the configurable dashboard for comprehensive overview of deals, tasks, and meetings.
- View pipeline conversion funnels, sector breakdown, and team activity visuals to help identify bottlenecks and workload distribution.
- Leverage relationship scoring with adjustable criteria to measure and assess the strength, quality, and potential trajectory of investments most likely to convert.
- Take control of your deals anytime, anywhere with Dynamo Mobile's full platform functionality for seamless on-the-go management.

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Gain Smarter Insights with Seamless Integration

From off-the-shelf dashboards and automated reporting to enterprise-grade security, Dynamo v3.0 transforms how your team collaborates, analyzes, and drives smarter investment decisions. Empower your financial workflows with transparency, efficiency, and innovation.



Benefits

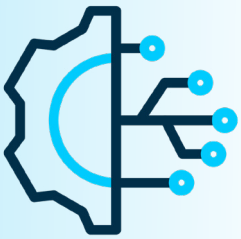
Analytics & Reporting

- Off-the-shelf dashboards and configurable views that can be tailored to specific workflows to gain clear visibility into pipeline activity, deal progress, and team performance.
- Automated reporting features to help generate audit-ready documents and due diligence outputs efficiently reducing manual efforts.

Built-in Security & Compliance

- Automated audit trails that track every change across the deal lifecycle and accounts to support regulatory audits and internal reviews.
- Integrated risk assessment features to help identify and mitigate potential compliance issues early in the process.
- Enterprise-grade security safeguards sensitive financial data with encryption in transit and at rest.
- Single sign-on (SAML/OAuth) and Two-Factor Authentication (2FA) for strong access control.
- Granular permission settings control access to each field or document.
- Comprehensive audit logs on record changes and user actions.
- Secure, SOC 1/2/3-audited cloud infrastructure with regional hosting options to meet data residency laws.

Dynamo Integration Ecosystem



Dynamo offers extensive integration options that enable clients to connect to other data sources—without having to do any coding. Learn more by downloading the integration brochure.

Dynamo v3.0 Deal Management redefines how deals are managed with a bold, all-new interface to enhance user experience and efficiency. Empower your team with smarter workflows, deeper insights, and seamless collaboration.

Ready to experience smarter, easier deal management? Schedule a demo today and see how Dynamo Deal Management v3.0 can unlock the potential of your deal processes.

Book a Demo

Awards & Recognition



About Dynamo Software, Inc.

Dynamo gives alternatives investors a Performance Edge, empowering them to efficiently scale their firm to capitalize on the growing wave of private market opportunities. With the **Dynamo Alternative Investment Platform**, investors can now run a tightly integrated firm, putting all their data to work to accelerate operations across front, middle, and back office, unleashing teams to work smarter, and allowing leaders to make better investment decisions and scale their firm. Dynamo has a global footprint with operations across North America, EMEA, APAC, and UAE. For more information, please visit **DynamoSoftware.com**.

- Founded in 1998
- 1,000+ global clients
- $10T client AUM

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