

## ClearList and Delio partner to provide investment infrastructure for alternative investment secondaries

Friday 13 September, 2024

- ClearList, the US-based firm transforming private transactions and enhancing liquidity, has partnered with Delio to provide distributors with an end-to-end toolkit that enables them to offer their clients access to private market transactions.
- The ClearList infrastructure is now live for distributors to white label — combining ClearList's end-to-end issuance environment and product suite for proprietary secondary transactions with Delio's enterprise-grade technology and supporting investment solutions.
- Combining both firms' expertise has enabled the secure distribution of exclusive opportunities, whilst also unlocking broader access to liquidity for advisors and investors, through market connectivity and capital availability; helping ClearList provide RIAs, wealth managers and private banks globally with the additional resources they need as part of an integrated, own-branded client proposition.

ClearList, the US-based firm transforming private transactions and enhancing liquidity, has partnered with Delio to provide distributors with the tools for offering their clients access to private market transactions. The ClearList connected infrastructure provides a full-service solution for advisors to enable their end-clients to securely access and transact in private markets with ease, all within a leading digital client experience combined with broader tools and supporting services that can be customised to their needs.

This partnership has led to the launch of ClearList's 'master platform', powered by the Hub and Spoke connectivity model that Delio successfully launched in their [Delio Vaults proposition](#) earlier this year. With 82% of secondary managers expecting deal volumes to increase by over 10% over the next twelve months<sup>1</sup> off the back of investor demand, advisors are looking to offer this differentiated access to their end clients. Combining both firms' expertise enables digital technology, investment vehicles and origination capabilities to work seamlessly within one centralised digital operating system.

The initial phase of the project utilises the platform's end-to-end capabilities across compliant client onboarding, fully digitised subscription processes, custom transaction workflows and automated portfolio reporting. Both firms are now working together to build interconnected channels and onboard sub-white-label platforms through this model to streamline secondary product distribution into ClearList's trusted partners, all while enhancing the efficiency of their operational processes for sharing products within their network.

This provides a secure and streamlined experience for partners alongside broader support to them in areas such as digital client experience implementation, investment structuring and liquidity solutions.

Gareth Lewis and Gareth Morgan, Co-Chief Executives at Delio, said: "Our continued focus on moulding our technology and proposition around the needs of our clients means we can continue to uncover those exciting use cases with firms that are truly looking to help unlock differentiated private market propositions. We're delighted to power the ClearList infrastructure and look forward to continuing to work with partners looking to provide their clients with access to some of the world's most innovative private companies."

Patrick Murphy, Chief Executive Officer at ClearList, said: "We are excited about our partnership with Delio as we strive to provide our clients with the best private markets experience possible. As the investing world moves towards a more digital environment, ClearList aims to use Delio's hub and spoke connectivity as a key component to place us at the forefront of that movement. This will help meet the digital operational requests of advisors and provide an end-to-end investment workflow online through our Delio Core-powered platform."

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