

Transforming enterprise planning for capital markets

Navigate market volatility, manage risk, and drive sustainable growth



Reimagining planning for confident decision-making

In today's fast-moving capital markets, firms must rethink how they plan to stay ahead. From volatile trading conditions, evolving regulations, and increasing investor demands, the challenges are nonstop. Navigating this complexity requires rapid responsiveness and strategic foresight — capabilities that traditional planning tools simply cannot deliver.

A gap between strategy and execution doesn't just cause delays — it leads to missed revenue and lost opportunities. Every strategic shift — across

finance, sales, HR, or compliance — demands seamless, coordinated responses. Yet siloed systems and outdated processes slow momentum and increase risk.

To outpace change, capital market firms need dynamic, enterprise-wide planning that connects teams, surfaces AI-driven insights, and fuels instant, informed decisions. With Anaplan, disruption becomes a catalyst for adaptability, resilience, and long-term success.



Unlocking enterprise-wide agility and intelligence with Anaplan

Anaplan is the market-leading platform for scenario planning and analysis, transforming data into actionable insights for real-time, optimized decision-making. We bring agility across your enterprise, enabling faster, smarter decisions so you can:



Activate your business by **seamlessly integrating data and systems** to operate more efficiently.



Accelerate planning and execution with **Anaplan applications** to move faster and adapt to change.



Connect teams to **align planning processes** across the organization, eliminate silos, and improve coordination.



Optimize decision-making with **Anaplan Intelligence**, empowering teams with AI-driven insights.

Unlike traditional planning tools, Anaplan empowers organizations with dynamic modeling, real-time adjustments, and scenario testing — enabling flexible, enterprise-wide plans that adapt quickly to change. Our centralized planning environment provides a single source of truth, ensuring seamless collaboration and greater efficiency.

With Anaplan, you gain speed, adaptability, and precision — turning planning into a competitive advantage across every business function.

FINANCE

Gain transparency into risk, liquidity, and financial health

Market volatility and regulatory complexity demand greater flexibility and foresight from FP&A teams — but legacy tools and siloed data often delay critical decisions.

Anaplan for Finance provides a connected, AI-infused planning engine that links financial, workforce, and operational models — enabling faster, more accurate insights and decisions.

- Gain real-time transparency into financial performance at the product, desk, or portfolio level.
- Boost efficiency and speed with automated reporting, balance sheet forecasting, and real-time AUM roll-forwards.

- Accelerate reporting with automated financial consolidation.
- Unify planning processes by consolidating budgets, forecasts, and capital plans across entities, geographies, and business units.
- Plan with confidence using AI/ML-based, multidimensional forecasting and dynamic scenario modeling.



HR AND WORKFORCE

Optimize talent, manage costs, and future-proof your workforce

Managing operating expenses with strategic workforce planning isn't just important — it's essential. But evolving business models, regulatory requirements, and skill shortages make workforce planning increasingly complex.

Anaplan for HR and Workforce delivers real-time visibility into talent capacity, helping align workforce plans with business needs to control costs and pivot with confidence.

- Gain instant insights into headcount, skillsets, and workforce costs across your entire organization.
- Better model and forecast compensation packages and their impact on profitability.

- Align talent strategies with business goals and budgets to improve resource allocation and profitability.
- Enhance transparency into talent gaps and forecast needs to stay ahead of change and accelerate decisions.
- Run “what-if” scenarios to evaluate the impact of market shifts, regulatory changes, and evolving skill requirements.



SALES AND MARKETING

Deliver stronger results with strategic GTM planning

Rising client expectations require capital market firms to adopt sales, distribution, and marketing plans that are strategically responsive — but misaligned go-to-market (GTM) strategies and static planning often lead to missed opportunities.

Anaplan for Sales and Marketing provides greater visibility into the drivers of sales performance and tools to build a connected revenue strategy — improving ROI and accelerating growth.

- Plan and model incentives and rewards to align advisor goals with business strategy and drive profitability.
- Design balanced, equitable territory plans that capitalize on market opportunity.
- Increase sales forecast accuracy to improve visibility into target and quota attainment.
- More easily manage complex crediting scenarios to ensure correct compensation of financial advisors.
- Use AI-powered insights to refine GTM strategies, maximize ROI, and align sales, marketing, and finance.



From insight to impact: Modern planning that drives results

Leading capital market firms trust Anaplan to plan and execute with greater speed, precision, and adaptability. By connecting strategy to execution across the enterprise, they stay ahead in a fast-changing market.

SUCCESS STORY

Copenhagen Infrastructure Partners delivers **87% faster reporting** and more accurate, faster data aggregation — empowering leaders and investors with better insights.



With Anaplan, we can look at 25,000 scenarios in combinations.

Kristina Kolchedantseva

Senior Financial Associate, Copenhagen Infrastructure Partners



SUCCESS STORY

MUFG Investor Services reduces risk and builds customer trust by automating complex calculations — achieving **85% faster processing** and 2X faster model setup for rapid response.



Anaplan has enabled us to create a differentiator out of what is usually considered a commodity service.

Mike Dickey

Head of Core Product, MUFG



Contact us today to explore how to transform your enterprise planning.

About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit www.anaplan.com

