



# Understanding the RMS Landscape

Here's What You Need to Know

# RMS Options at a Glance

An overview of how VerityRMS compares with other commonly used research management options

Platform	Primary Focus	Strengths	Limitations	Best Fit
<b>VerityRMS</b>	RMS for fundamental investors, across multiple asset classes	Workflow automation, knowledge share, reporting, and deep integrations/API	Optimized for internal research, external data via flexible integrations	Firms scaling research, workflow, and collaboration
<b>Bipsync</b>	RMS with allocator and GP/LP workflows	Process and project management capabilities	Deeper integration or permissions control may require custom work	Firms prioritizing CRM-like multi-step process, task, and project management
<b>FactSet RMS</b>	RMS module within FactSet's terminal	Seamless access to FactSet data and models	Limited configuration within FactSet ecosystem	Firms standardized on FactSet terminals
<b>AlphaSense</b>	Search-driven research workspace	Excellent for external and broker content discovery	Internal research is limited as well as configurability	Teams leading with external content discovery
<b>Bloomberg RMS</b>	Add-on within Bloomberg	Embedded in the Bloomberg workflow	Configuration within Bloomberg ecosystem	Desks operating in Bloomberg terminals
<b>EDS RMS</b>	RMS module within a broader platform	Unified vendor environment	RMS not core offering, requires extensive configuration	Firms adopting multiple EDS modules
<b>DIY</b> (Email & Shared Drives)	Generic document storage and collaboration tools	Familiar, low-cost option	Manual permissions and no audit trail	Early-stage or teams of three or fewer

# Key Considerations

1

## Governance & Compliance

Are permissions, approvals, and reporting requirements critical?

2

## Integration Needs

What data sources, analytics, or workflows need to connect?

3

## Scalability

Might usage expand across asset classes, offices, or teams?

4

## Research Mix

Is the focus internal IP management, or external content discovery?

5

## Implementation Approach

How much time and support can you invest in configuration?

6

## Flexibility

Can your RMS reflect your process, and evolve with it as it changes over time?

7

## AI Capabilities

Most modern RMS platforms now include AI features for summarization, tagging, and search. Evaluate the software's implementation maturity, execution, and fit for your workflows.

## How to Think About Fit

Each option fits a distinct research culture and technology strategy. VerityRMS is best suited for teams that treat proprietary research as a strategic asset — one that needs structure, compliance, and collaboration at scale. Other systems may offer faster setup, terminal integration, or external content discovery, but typically trade off governance depth and flexibility.

This comparison reflects general market positioning and publicly available information as of January 2026. For detailed feature comparisons, we recommend product demos and discussions with each vendor.

For detailed use cases or demos, visit <https://verityplatform.com/solution/verityrms/> or contact [sales@verityplatform.com](mailto:sales@verityplatform.com).