

Equity Research

Europe-based Investment Bank

\$15-18

annualized cost savings

\$150m+

in savings since inception

500+

stocks under coverage

15%

technology-driven efficiencies

CLIENT CHALLENGES

The client, a large European investment bank, wanted to set up an enterprise-wide strategic offshore research support team to

- » increase equity research coverage across US, European and Asian markets
- » leverage offshore support for credit and strategy research
- » lower costs and increase flexibility
- » free up bandwidth for onshore teams to focus on value-added areas

OUR APPROACH

- » Assembled an analyst team based on discussions with onshore analysts on the tasks likely to be offshored, and the corresponding skill levels required
- » Put in place one-on-one and pooled structures to meet various client requirements
 - in the one-on-one model, analysts interact directly with the onshore analysts and supervisors manage the engagement
 - in the pooled structure, supervisors manage work allocation, quality control and delivery
- » Deployed analysts with sector-specific knowledge to facilitate one-on-one dedicated research

IMPACT DELIVERED

- » Expanded coverage into newer sectors and geographies
- » Enabled the client to perform high-value activities such as marketing, idea generation, and research-intensive and monitoring tasks
- » Provided operational flexibility and access to extensive research services on short notice

About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.