

# Acuity KnowledgePartners Strategic solutions for Private Wealth

## WHAT DOES ACUITY DO?



Provide **intelligent human capital** to help with front- and middle-office tasks

01



Leverage **proprietary technology solutions** for capital markets and create bespoke tech offerings

02



**Free up** front office and onshore **capacity** to focus on revenue growth and franchise building

03

## HOW DO OUR SERVICES BENEFIT OUR CLIENTS?



### SAVE MONEY

- » **30-70% cost savings** vs. fully-loaded cost of onshore resources



### SAVE TIME

- » **20-60% time reduction** by automating tasks
- » Improved time to market using time zone advantage



### FLEXIBILITY

- » **Adjust team sizes** with demand dynamics
- » **Reduced vulnerability** to market cycles

## WHY DO FIRMS CHOOSE TO WORK WITH ACUITY?

 **waters**  
Rankings 2021



**Best Outsourcing Provider to Capital Markets**

**3,500+ FTEs**  
**350+ Clients**

Setting the benchmark in outsourcing industry for 20 years

We hire the **best offshore talent** and invest in the **strongest InfoSec framework**

# ACUITY PRIVATE WEALTH FRANCHISE OVERVIEW

### ONE-STOP SHOP

- » End-to-end research and advisory services
- » Effective portfolio management support
- » Sales and marketing support to focus on AuM growth
- » Robust compliance support

### Value Delivered

 <b>AUM Growth</b>	 <b>Optimise Cost</b>
 <b>Ideas and Insights</b>	 <b>Speed to Market</b>
 <b>Reduced Risk</b>	 <b>Strengthened Compliance</b>

### DEEP-ROOTED PRIVATE WEALTH FRANCHISE

- » Supporting global private wealth since 15 years
- » Long-standing supervisors (average Acuity tenure of 10+ years)
- » Cross functional and asset-class-specific trainings

### TRUSTED BY GLOBAL PRIVATE WEALTH MANAGERS

- » Pre-final form research support across global markets
- » Cross-asset research solutions
- » Extension of in-house teams

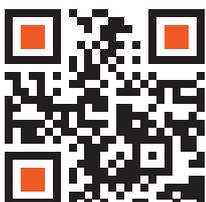
### TOP TALENT

- » CA/CFA/FRM certified
- » Postgraduate in finance and economics
- » CFA Institute-accredited investment research training program

## PRIVATE WEALTH SUPPORT ACROSS ALL STRATEGIES

Research & Advisory	Portfolio management	Sale & Marketing	Compliance
Research support – Equity, Credit and Funds	Portfolio research & analytics	Factsheets, presentations, pitchbooks & other collaterals	Client due diligence & financial crimes process
Coverage initiation and maintenance	Performance and risk	Investment writing, newsletters and bulletins	Investment compliance support
Thematic and sector research	Operations support	Client reports, MIS and Dashboard	Monitoring & surveillance
News alerts and monitoring	Data management & technology	Digital marketing	Corporate compliance support
Corporate governance and ESG analysis	Manager research	RFP / DDQ support	AML Support & Data and Analytics

For more details scan the QR code or visit [www.acuitykp.com](http://www.acuitykp.com)



### About Acuity Knowledge Partners

Acuity Knowledge Partners (Acuity), 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 experience in servicing over 400 clients by deploying its 4,000 specialist workforce of analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance to innovate, implement transformation programmes, increase operational efficiency, and 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 backed by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.

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