

# Costa Rica: Nearshore Center for North American Firms

## INVESTMENT RESEARCH SUPPORT TO A US-BASED INVESTMENT BANK



Client Challenges	Moody's Approach	Impact Delivered
<p>A top 5 global investment bank wanted to expand its research team to:</p> <ul style="list-style-type: none"> <li>» Equip its North America-based analysts with real-time research support</li> <li>» Free up bandwidth of onshore teams to help them focus on value-added areas</li> <li>» Increase equity research coverage</li> <li>» Lower costs and increase flexibility</li> </ul>	<ul style="list-style-type: none"> <li>» Deployed a 30-member analyst team with sector-specific knowledge on a dedicated basis in Costa Rica</li> <li>» Facilitated an engagement structure to meet various client requirements</li> <li>» Solutions include:                             <ul style="list-style-type: none"> <li>– Building, restructuring, and maintaining company financial models</li> <li>– Providing pre-earnings support and live support during earnings</li> <li>– Assisting in preparing investment notes (company and sector notes)</li> <li>– Building, restructuring, and maintaining sector and valuation databases</li> <li>– Creating and updating marketing presentations</li> <li>– Collaborating on general thematic research and projects</li> <li>– Monitoring company and sector news</li> <li>– Using master proprietary tools and third-party data provider systems</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>» Real-time support to over 35 North America Equity Research analysts across multiple sectors</li> <li>» Access to talent base without any additions to onshore headcount</li> <li>» High client satisfaction, with average feedback score of 4.4/5.0</li> <li>» Substantial cost savings versus hiring analysts onshore</li> </ul>

### ABOUT MOODY'S ANALYTICS KNOWLEDGE SERVICES

Moody's Analytics Knowledge Services, a division of Moody's Analytics, is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 200 financial institutions and consulting companies through a team of over 2,600 subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.

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