

# CDB Updates for a Top 15 Global Asset Manager

A top 15 global asset management company based out of Boston required support in updating data on consultant databases (CDB) update over 5,000 profiles in a year, covering more than 30 consultants, including online data submissions and manual data requests

## CLIENT CHALLENGES

- Bandwidth constraints to carry a large number of uploads during a busy quarter-end reporting period
- Inability of the client team to update [fixed income](#) characteristics due to difficulties in data sourcing
- Multiple data sources and formats for different data categories
- Low product visibility in manager searches due to poor data quality and delays in uploads

## OUR APPROACH

- Data sourcing and aggregation
- [CDB uploads](#), questionnaires, and ad hoc data requests
- New fund profiles registration and historical data uploads
- AuM reconciliation and publishing
- Periodic data audits

## IMPACT DELIVERED

- Conducted whiteboarding sessions to understand the client's data sources, formats, availability, deadlines and gaps
- Automated various intermediate processes related to data sourcing and formatting, and AuM break-up calculations
- Set up data templates for fixed income characteristics and allocations
- Centralized a data store for quick data access
- Implemented an efficient [work-flow management](#) system to improve deadline, and data tracking, and effective governance

## About Acuity Knowledge Partners

Acuity Knowledge Partners is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 350+ financial institutions and consulting companies through a team of over 3,000+ 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.

---

© 2021 Acuity Knowledge Partners. All Rights Reserved.

[contact@acuitykp.com](mailto:contact@acuitykp.com) | [acuitykp.com](https://www.acuitykp.com)

