

Enterprise Application Development And Data Management Streamlining For a US Pension Advisory Firm

95% efficiency increase

50% y/y client growth

~80% automated fund status report generation process

CLIENT PROFILE AND CHALLENGES

- [Portfolio management](#) team of a top US pension advisory firm
- Key challenges were:
 - Enhanced [client reporting](#)
 - Improved ability to source new investments, retain clients
 - Better [fund manager](#) evaluation
 - More robust and integrated database and reporting architecture

OUR APPROACH

- Re-engineered the business process by building a centralised data warehouse to pull data from various internal and external [data sources](#)
- Developed a complete framework for the entire research, analytics and operations process
- Developed comprehensive ETLs, data adaptors, and data validation filters
- Built an analytical platform to accelerate the regulatory and investor report generation process
- Used data validation filters to publish research, analytics and reports at an enterprise level
- Achieved an overall efficiency improvement of 95% in generating a 70-page report

IMPACT DELIVERED

- [Acuity Knowledge Partners](#) conducted a detailed white-boarding session to scope out support levels and complexity
- Presented a scalable solution for up to 50% y/y client growth
- Improved ability to source new investments, retain clients
- Enabled high-powered real-time analytics
- Reduced production time of a 70-page quarterly performance report by 95% (to <5days from 90 days)

- Achieved ~80% automation for fund status reports from trustee feeds using 40+ security types and 100+ data feeds

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.

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