

Fixed Income Research for a US Based Investment Bank

\$400k
annualized savings

100+
corporates/banks
under coverage

10%
process-driven
efficiencies

25%
reduction in time for
earnings/events
releases

CLIENT CHALLENGES

- The client was looking for offshore support to contribute to portions of its research publications pertaining to the European (Developed Markets) CLO coverage universe.
- The client's in-house team was spending inordinate time on
 - tracking quarterly and annual performance
 - updating financial models and summarizing earnings calls, and
 - maintaining its database of hundreds of companies
- Added to this were nonstandardised model templates for each client analyst

OUR APPROACH

- Kicked-off with a single member engagement to update models and summarize earnings calls
- Created a more standardized template for both models and earnings calls to gain efficiencies
- Provided support on additional areas, including updates to the quarterly handbook
- Provided supervisory overlay to ensure accuracy and timeliness of deliverables
- Ensured periodical supervisory governance, with timely feedback incorporated in deliverables

IMPACT DELIVERED

- Provided additional support, expanding the relationship to a five-member team
- Provided support on timesensitive, ad hoc research and analytical tasks
- Standardized tasks, which helped the client save an additional 10% of total time spent
- Freed up client analysts' bandwidth, enabling them to spend more time with companies' management and investors, and to generate ideas
- Saved over \$400k annually for the client

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 400+ financial institutions and consulting companies through a team of over 4,000+ 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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