

# Portfolio Research and Operations for an Institutional Asset Manager

**\$1.4m** in annualized savings

**80%** faster turnaround time

Pooled resourcing structure

Centralized solution for standardized analytics

## CLIENT CHALLENGES

- The board of the client engaged a global [consulting firm](#) to identify the right partner to accelerate its strategic growth plan
- [Acuity Knowledge Partners](#) was selected to provide knowledge services after a rigorous selection process
- As part of this mandate, the client required Acuity Knowledge Partners to perform performance and risk analytics for its investment division teams
- The client also needed Acuity Knowledge Partners to create an advanced analytics framework for its existing performance measurement, investment risk assessment, portfolio attribution capabilities, manager research, [data management](#) and [client reporting](#)

## OUR APPROACH

- Deployed a 25-member team of domain specialists knowledgeable in MATLAB, R, C#, Excel and VBA and proficient in FactSet, Barra and Axioma systems
- Customized reports for each asset class across global teams to best suit [portfolio managers'](#) requirements
- Ensured centralized report production and, wherever possible, standardized templates
- Integrated advanced risk analytics platforms - Axioma and Barra - with client systems
- Fully automated the process of producing and distributing reports based on FactSet Portfolio Analytics, Dashboard and Batcher
- Managed data flow across multiple databases and assisted in the manager/benchmark transition process
- Developed and maintained [tools](#) for internal client needs

## IMPACT DELIVERED

- Reduced the turnaround time of scheduled analytics - 80% faster (T+2 vs. T+10 previously)
- Saved \$1.4m in annualized costs
- A pooled resourcing structure helped inter-connectivity across various teams within the investment

division

- Delivered an end-to-end solution across different phases of the portfolio life cycle
- Provided access to domain specialists for custom analytics support

### **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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