

Research Publishing support for a bank's Asia-Pacific equity research team

40+ client analysts supported

Editing (SA-level checks), formatting, and publishing

Exclusive 10-member team

CLIENT PROFILE AND CHALLENGES

- The equity research team of a global investment bank required editorial and formatting/publishing support to supplement its onshore team of editors and publishers
- The client specifically required Acuity Knowledge Partners to provide independent support before market open and after market close; this was in addition to supplementing the onshore team during regular hours
- Editors were to review documents for language, logic, and regulatory issues, such as promissory language, front-running, and touting (i.e., supervisory analyst-level checks)

OUR APPROACH

- We deployed a team of three senior Editors with experience in equity research, along with two equally experienced DTP resources, to support the onshore publications team
- Our team visited the bank's office for two weeks to receive training and become familiar with the client's workflow tool and publication guidelines and systems, including liaising with the control room
- Our team worked closely with the head of publications and the onshore research production team to document guidelines and processes for offshore support

IMPACT DELIVERED

- Our editorial and DTP team is fully integrated with the onshore research publication platform, thus allowing seamless editorial and DTP support
- The team created a document detailing standard operating procedures (SOP) and augmented the bank's style guide; queries raised by the team triggered significant changes in the production-related sections of the client's Compliance Manuals and the Production Process Manual
- Six months into the engagement, the client requested for support to be extended to its other research teams as well; a 10-member team is now in place to support 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 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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