

Impact Story – Fund Marketing Services

Europe-based Asset Manager



Why they chose us?

A global asset management firm required support in generating various reports, such as factsheets, presentations, brochures, client reports, and other Excel-based reports. It expected large volumes and wanted to ensure a quick turnaround with consistent quality. However, the client was facing the following challenges:

- » Lack of bandwidth to handle quarterly volume peaks and increased demand from sales for new sales collateral
- » Lack of sophisticated database, issues with data quality, and coordination with multiple teams, which delayed time to market of reports

The client required a partner with proven expertise in fund marketing support, coupled with technology expertise, who could help deliver a profitable strategy



How we solved the problem?

- » Assisted the client in designing a centralized database to plug data from various sources, including financial data providers
- » Acted as a central team and co-ordinated with various teams to source data
- » Automated data collation, validation, and reporting for a standard set of reports to improve report quality
- » Used MA Knowledge Services Report Generator, a proprietary tool, to automate report generation
- » Streamlined processes and eliminated unwanted/manual sub-processes to reduce turnaround time



What we did differently?

- » Deployed a multidisciplinary team with domain experts from fund marketing, data analytics, technology, and DTP
- » Implemented an efficient work-flow management system to improve turnaround times and data tracking, resulting in effective project management
- » Leveraged our experience in working on similar processes with other global asset managers and implemented best practices
- » Implemented strong governance framework to provide strategic guidance to the engagement

About Moody's Analytics Knowledge Services

We enable global financial organizations to innovate and transform in an ever-changing world. Our combination of subject matter experts and technology solutions drive operational efficiency, and seamless scaling. Providing customized solutions is in our DNA – solutions that have a tangible impact on our clients' top-line and bottom-line, enabling them to achieve more with less.

Our clients include leading financial institutions, asset managers, Fortune 100 corporations, mid-tier companies, and boutique investment banks. We support over 150 institutional clients through our team of 2,600+ employees and our global delivery centres, located in close proximity to our clients.