

Equity Research Support for the Buy Side

Europe-based Asset Manager

Support to **~50**
analysts across 4 client
research groups

1200
models standardized and
650 results updated every
quarter

~75
industry reviews and
9 additional due
diligence reports

7
flagship products
and 350 value additions
across sectors

CLIENT CHALLENGES

- » The client wanted to outsource secondary research work
- » This would release the bandwidth of its onshore analysts to focus on primary research, conduct in-depth analysis, expand coverage, and improve time to market

OUR APPROACH

- » Initially supported the client's Europe team in building and maintaining financial models, industry databases and charts (absolute/relative analysis of stock performance/valuations, etc.)
- » Split the team into sectors to mirror client analyst team set-up
- » Conducted training and two-layered quality checks, and created documentation (SoPs)
- » Held monthly calls with Directors of Research to gauge analyst productivity and work trends

IMPACT DELIVERED

- » Migrated ~1,200 models to a standard template, aiding the portfolio manager's decision-making process
- » Reduced turnaround time and improved efficiency by 30% for some standard tasks
- » Helped client analyst transitions by maintaining models during the handover period
- » Rolled out value additions, helping broadcast client analyst ideas across sectors
- » Extended supported to other teams and supported portfolio managers and Directors of Research on an ad hoc basis

About Acuity Knowledge Partners

Acuity Knowledge Partners, formerly part of Moody's Corporation, is a leading provider of bespoke research, analytics, staffing and technology solutions to the financial services sector.

Headquartered in London, Acuity Knowledge Partners has nearly two decades of transformation experience in servicing over 300 clients with a specialist workforce of over 2,500 analysts and delivery experts across its global delivery network.

We provide our clients with unique assistance not only to innovate, implement transformation programmes and increase operational efficiency, but also to manage costs and improve their top lines.

These services are supported by our proprietary suite of Business Excellence and Automation Tools (BEAT) that offer domain-specific contextual technology.

Acuity Knowledge Partners is assisted by Equistone Partners Europe, a leading private equity organisation that backs specialist growth businesses and management teams.