

Fixed Income Research

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 non-standardised 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 time-sensitive, 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, 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.