

## Case study

US alternative asset manager boosts efficiency by delegating 100% valuations roll-forward on 500+ L3 investments

### Background



- A US alternative asset manager was seeking support on valuation workflows while facing high attrition rate, which delayed critical tasks, such as valuation reporting and audits, due to limited team capacity. There was a crucial need to identify workflows to delegate and release onshore bandwidth.

### Crisil Integral IQ solution



- The onshore team delegated end-to-end ownership of the new deal onboarding post-closure by the deal team
- Helped streamline valuation workflows, achieved efficiency gains through roll-forward of existing valuations of L3 investments (500+ deals) on a monthly or quarterly basis
- Analysts received dedicated support to prepare valuation committee decks for the deal team, senior management, and independent members' review
- Developed comprehensive standard operating procedures for reference and quick training
- Supported limited partner and corporate reporting by reconciling and validating data against valuation models

### Client impact



- The valuation team could allocate resources to high-impact initiatives by having the entire new deal onboarding process seamlessly handled by Crisil Integral IQ team
- Enhanced accuracy and reliability in investor reporting, supported by validated and reconciled valuation data
- Increased operational efficiency, with a 40% timesaving, achieved through streamlined audit process ownership, freeing up critical onshore bandwidth

### **About Crisil Integral IQ (formerly Global Research & Risk Solutions)**

Crisil Integral IQ delivers solutions and actionable intelligence to top financial institutions, driving strategic transformation, risk optimization, and operational excellence. Our offerings across research, risk, lending, analytics and operations have empowered clients to navigate complex markets, mitigate risks and unlock new opportunities. Our domain expertise, innovative solutions, future-ready technologies such as AI and data science give clients the confidence to accelerate growth and achieve sustainable competitive advantage. Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East.

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Founded in 1987 as India's first credit rating agency, our expertise today extends across businesses: Crisil Ratings, Crisil Intelligence, Crisil Coalition Greenwich and Crisil Integral IQ.

Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East, setting the standards by which industries are measured.

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