

## Case study

We empowered a leading asset management firm by automating its sustainable investment eligibility decision model, delivering 95% workflow efficiency



### Background



- A leading US-based asset management firm sought to automate its sustainable investment eligibility decision model for a universe of 1,200 emerging market companies, based on its proprietary methodology
- The existing process was entirely manual—collecting ESG data from multiple vendors and applying the client’s rulebook to determine investment eligibility, which made the process time-consuming, error-prone and difficult to scale

### Crisil Integral IQ solution



- We analyzed the detailed methodology document provided by the client, which laid out the rules, thresholds and data dependencies for determining investment eligibility
- The end-to-end workflow was automated using Python on Jupyter Notebook, starting with replacing the manual data collection process by retrieving over 30 ESG and financial metrics data for 1,200 companies from the client’s internal data ecosystem via API, which served as a centralized repository that stores ESG and financial data from external vendors
- We codified the client’s decision-making methodology, which involved applying specific thresholds, statistical tests and screening criteria, and generated investment eligibility decisions for all the emerging market companies

### Client impact



- Reduced end-to-end turnaround time for generating investment eligibility decisions from 12 hours to 30 minutes—a 95% improvement in operational efficiency
- Replaced fragmented manual data collection with a robust, API-driven pipeline—enhancing data reliability, minimizing analyst intervention and streamlining downstream ESG analysis
- Developed a modular Python framework to support scalable deployment across regions and investment themes

### **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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### **About Crisil**

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Large and highly respected firms partner with us for the most reliable opinions on risk in India, and for uncovering powerful insights and turning risks into opportunities globally. We are integral to multiplying their opportunities and success.

Headquartered in India, Crisil is majority owned by S&P Global.

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.

Crisil's global 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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