

# Case study

We helped the structured finance team of a global investment bank boost client engagement, top investor surveys



## Background



- The client aimed to significantly strengthen its research capabilities and expand its publications to enable broader and deeper client engagement
- The main objective was to secure the top ranking in institutional investor and industry surveys, establishing a clear leadership position

## Our solution



- Sanitised and standardised legacy datasets to foster the development of reliable and accurate underlying research data
- Built real-time monitoring dashboards to track issuances, ratings, defaults and LMEs across the CLO portfolio aggregated from multiple data sources
- Partnered with the bank's lead analysts to define research objectives and deliver independently designed, end-to-end analytical outputs
- Provided timely, actionable insights to support ongoing coverage and client interactions and communications
- Deployed automation using VBA to materially reduce manual efforts on the publishing of periodicals and improve regular workflow
- Enhanced the quality of research publications by gathering latest market intelligence and highlighting emerging trends, making them more actionable
- Refreshed client-facing pitches and presentations to reflect current views
- Provided rapid, on-demand analytical support to address queries from investor clients

## Impact



- The bank's structured finance research team consistently topped institutional investor surveys by a substantial margin
- The team also earned top research house recognition in industry surveys such as Creditflux and LSTA
- Research on LMEs and distressed credit drove high readership and strong client interest and engagement
- Automation initiatives saved more than 50 hours per month, enabling the team to focus on servicing investor clients.

### **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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