

Case study

Delivered 82% execution efficiency for a leading global asset manager through automation



Background



- The fixed income performance attribution team of a leading global asset manager was facing operational bottlenecks in reporting workflows, leading to delays
- Weekly and monthly attribution report generation was heavy on manual effort and prone to data quality issues, which affected reporting accuracy and decision-making confidence
- Lack of standardized reporting formats made comparisons across portfolios difficult and slow report turnaround times impacted decision timelines of portfolio managers

Our solution



Automation and process transformation

- Automated 16+ attribution report generation processes

Standardized reporting framework

- Established consistent formats for cross-portfolio comparisons
- Enhanced data quality controls

Infrastructure set-up

- Set up centralized GitHub repositories and central servers
- Improved version control, process documentation and collaboration

Ad hoc enhancements

- Delivered the improvements portfolio managers wanted, including conversion of Excel reports into Power BI

Key transformation metrics



82%

Efficiency gain

1,285

Hours saved/ year

13

Processes automated

~15 days

Average delivery time

Client impact



- Improved overall efficiency by 82% through automation
- Saved 1,285 hours annually across automated processes
- Enhanced decision-making by portfolio managers with unified Power BI dashboards
- Eliminated key person dependency and operational risk through centralized version control, ensuring uninterrupted client delivery and business continuity

Tools and technology



Python

GitHub

Power BI

Central servers

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