

Case study

Enhanced attribution process efficiency for a global asset manager

Background



The fixed-income performance attribution team of a leading global asset manager was dependent on manual processes, inconsistent data sources, manual data uploads, which caused delivery delays and high error rates. The company engaged us to streamline the attribution process, reduce manual intervention, and improve timeliness of reporting.

Challenges



- Significant individual intervention for generating performance attribution
- Manual input required for portfolio and/or benchmark data management
- Limited ability to scale as the number of portfolios grew
- Hands-on intervention required for data uploads and for data correction, and no data checks

Our solution



- **Standardization:** Streamlined 23+ tasks/workflows by eliminating manual dependencies
- **Process automation:** Introduced process automation using python scripts
- **Scalability:** Implemented scalable automations where they can be applied across multiple strategies
- **Easy usability:** Designed reporting templates for plug and play
- **Process documentation:** Put in place well-defined standard operating procedures
- **Data robustness:** Automated data uploads with well-defined validity checks eliminating data inconsistencies

Client impact



>95% delivery on time meeting client deadlines



Improved stakeholder confidence for timely and accurate reports



Superior report quality and accelerated turnaround by streamlining report design



Standard operating procedures leading to preservation of process knowledge



Enhanced scalability without additional resources

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