

## Case study

Driving AUM growth with 50% increase in coverage initiation for a top AM, along with more thematic publications

### Background



The global asset manager (AM) wanted to optimise their proprietary methodology to identify and accommodate high-quality, standardised economic data to enable better decision-making and scalable quantitative strategies.

### Challenges



- **Data inconsistency:** Lack of standardised data led to unreliable results and made it challenging to compare companies across sectors and regions
- **Regulatory and ESG variability:** Inconsistent application of changing regulatory, accounting and ESG standards skewed model outputs
- **Limited scalability:** Insufficient internal research capacity restricted expansion to new markets or a broader stock universe
- **Validation issues:** Difficulty in demonstrating the model's economic valuations to stakeholders undermined trust
- **Barriers to insight-driven publications:** Fragmented data sources and manual synthesis acted as barriers to market scalability

### Our solution



- **Consistent data foundation:** Financial statements were standardised into a unified format, providing reliable input for quantitative models
- **Supporting research expansion:** Designed scalable and automated workflows that enhanced research capabilities driving AUM growth
- **Adaptive valuation framework:** Incorporation of the evolving ESG and accounting standards preserved relevance of the economic model
- **Proprietary research insights:** Produced new publications on value strategies and market dynamics by using the enhanced database

### Impact



**50% increase in the new coverage initiations** helped expand strategies to drive AUM growth

**As model agility improved,** standardised economic data and transparent valuations were delivered, **enabling decisive investments and earning stakeholder trust**

**20% increase in thematic research publications** facilitated a wider market reach

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