

Case study

Partnership with an asset manager to develop a retail-ready strategy for an Asia-focused bond

Background



The objective was to create a retail-ready strategy for an asset manager to effectively raise funds by repositioning an Asia-focused bond offering for mass affluent investors while meeting retail distribution and compliance requirements.

Challenges



- Institutional-first materials: Legacy decks were dense and technical, limiting their resonance with retail investors
- Content overload and compressed timelines: 50+ slides and 100+ charts to triage and simplify into a cohesive retail narrative
- Asset manager-specific sensitivities: Terminology, reference index positioning and payout language had to meet compliance standards

Our solution



- System design and capabilities: Converted complex Bloomberg-driven and portfolio data into a retail-ready investment narrative by translating portfolio manager views into clear, high-impact visuals
- AI-assisted content refinement to streamline and copy chart choices: Advanced data curation, visualisation and a centralised content repository ensured consistency and scalability to maximise distribution effectiveness
- Testing, validation and refinement: Partnered with the sales team to incorporate real-world client and distributor feedback to improve messaging. Standardised disclosures, terminology and workflows to incorporate governance

Impact



Raised **\$250 million** till date from investors via the asset manager's platform

50 engagements across retail segment and premier clients, including private, onshore and offshore categories

~3x traction versus a peer income strategy launched in parallel

Successfully competed against a global house with scale advantages

Compliance velocity: Retail deck, brochure and subsequent add-on updates cleared in rapid cycles, supporting continuous campaign activity

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