

Case study

Achieved ~40% operational efficiency through a tailored performance attribution framework

About the client



A mid-sized Europe-based global asset manager seeking to enhance performance reporting and attribution to meet growing investor demands.

Client challenges



- Frequent investor queries required real-time access to granular performance data
- Data was spread across multiple systems, requiring manual collation and validation
- Query responses were time-consuming and error-prone, especially when handling multiple requests simultaneously
- No centralized system to manage query handling, slowing down turnaround times and increasing operational strain on analysts

Our solution



Crisil team enabled an automated, end-to-end performance attribution framework that included:

- A centralized 'Query Master' file housing all key performance data, updated frequently, and validated automatically
- Developed a query-driven interface allowing analysts to input investor questions and received structured outputs with minimal effort
- Automated logic to organize, format, and validate data from the master file based on the nature of each query
- Single-click document generation for client-ready responses instantly
- A scalable system designed to handle multiple queries in parallel, significantly improving workflow efficiency

Impact and results



~40%

Reduction in manual effort

Real-time attribution

By risk driver triggered at the command level

50-60%

Faster turnaround time

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About Crisil

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