Crisil
Integral IQ

Case study

Sharper Allocation Decisions in 40% Less Time

About the client

A UK-based asset management firm wanted to develop a quantitative and objective framework to determine the relative attractiveness of various asset classes.

Client challenges

- Selecting relevant factors and weighting across asset classes
- Inadequate granularity in performance evaluation
- Complexities in comparing qualitative and quantitative metrics
- Fragmented risk analysis across asset classes
- Inefficient asset class benchmarking and lack of actionable outputs from raw data

Our solution

Crisil team:

- Introduced a structured scorecard approach combining top-down metrics (macro trends, geopolitical events, market sentiment, global liquidity) and bottom-up inputs (company fundamentals, earnings growth, cash flow analysis)
- Developed a customized weighting mechanism tailored to client's strategic focus
- Built a scorecard at the granular level incorporating sub-categories within each asset class
- Integrated a range of sub-factors, including asset-specific risks such as duration (for fixed income), vacancy rates (for real estate, and counterparty risk (for alternatives)
- Embedded risk-adjusted scoring across all factor layers
- Benchmarked attractiveness scores against historical trends and relevant peer data
- Translated scorecard results into decision-ready metrics

Impact and results

Comprehensive
Portfolio visibility across asset classes

40%
Less time spent on asset class analysis, freeing bandwidth for strategy

10+
sub-factors analyzed per asset class, driving deeper insights

by S&P Global

About Crisil Integral IQ (formerly Global Research & Risk Solutions)
Crisil Integral IQ delivers solutions and actionable intelligence to top financial institutions, driving strategic transformation, risk optimization, and operational excellence. Our offerings across research, risk, lending, analytics and operations have empowered clients to navigate complex markets, mitigate risks and unlock new opportunities. Our domain expertise, innovative solutions, future-ready technologies such as AI and data science give clients the confidence to accelerate growth and achieve sustainable competitive advantage. Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East.

For more information, visit IntegralIQ.Crisil.com

About Crisil
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Large and highly respected firms partner with us for the most reliable opinions on risk in India, and for uncovering powerful insights and turning risks into opportunities globally. We are integral to multiplying their opportunities and success.

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Crisil's global workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East, setting the standards by which industries are measured.

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