

Dedicated specialist support for onshore sector leaders

Client

A renowned market-leading institutional brokerage house in Germany having several top-rated sector analysts.

Opportunity

The onshore team of sector-focused equity research analysts were looking for reliable and knowledgeable offshore partners who could assist in deep-dive equity research across sectors and companies. The client team also wanted value-added research ideas to differentiate their research product from the competition to maintain/improve their Extel survey rankings.

10

Sector specialists dedicated on a one-on-one basis

30%

Lower production time of standard outputs through automation

100

Stocks covered annually across 10 sectors

>6

Year-long relationship with 2x growth in offshore team size

Value Delivered

1

Most of the rated onshore analysts witnesses improved Extel rankings over the relationship.

2

End-to-end solution encompassing sector expertise, deep-dive research, research production and delivery, and readership analytics on the produced research.

3

Enabled onshore analysts to get more face-time with clients and focus on corporate access initiatives.

Solution

- Deployed sector specialists with proficiency in trend identification and analysis, complex financial modeling based on sector-specific KPIs, and equity valuation techniques.
- Prepared sector compendiums and macro-level datasets and ran statistical tools such as correlation and regression analysis on the data to formulate high-quality assumptions for forecasts.
- Deployed technology solutions using Python, Spyder etc. to scrape alternate data sets, automate news and date collection, and perform e-channel checking (e.g. social media monitoring) to identify/validate sector and product trends.
- Supported on preparing coverage initiation notes, quarterly update notes, flash notes, sector notes, marketing collateral and top-down thematic analysis to generate action-oriented research ideas.
- Attended conference calls in absence of the analyst and provided coverage on peers (i.e. shadow coverage) to provide cross-read into the finer sub-industry dynamics.
- Provided a technology-driven solution for readership analytics on published research and prepared insightful dashboarding of the findings for the Head of Research.



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