



Reliable research partnership with automation-driven output

Client

Institutional brokerage department of a leading full-service bank in the GCC market.

Opportunity

The client was looking for a reliable research partner to share responsibility of the research coverage by acting as an extended arm of the onshore team. Apart from the regular fundamental equity research support, the client also wanted round-the-clock support on market periodicals, generating ideas for the trading desk, investment ideas using technical analysis and handling first-level client queries.

100%

Flexibility of the delivery model to align fully with the client team

>50%

Automation of newsletters and sector compendiums

>98%

Score in client satisfaction surveys for the past 7 years

Value Delivered

1

A fully flexible and aligned delivery team that supported client needs across sectors.

2

A reliable team that acted as an extension of the onshore team, taking responsibility of the research output.

3

Some of the research produced was selected by reputed academic institutions in the US as reference material.

Solution

- Deployed a team of 5 qualified senior research analysts that worked according to client timings, weekdays (Sunday – Thursday shift) and holiday schedules.
- Offered a full suite of standard fundamental equity research support like preparing deep-dive financial models with valuation, preparing initiation notes, identifying and analyzing sector trends and themes, maintaining coverage on a quarterly basis, and preparing various periodical newsletters.
- Acted as a 'cover analyst' for the onshore analysts in their absence, represented the client on conference calls, participated in management calls and presentations and answered first-level queries of end-clients (institutional investors) on coverage and industries.
- Co-ordinated with the trading desk to share trading ideas after the daily morning meeting of analysts.
- Gained knowledge of publishing softwares used by the client and delivered final-form output which could be directly sent to supervisory analysts for their review.
- Automated >50% of the output in daily and weekly market newsletters, sector databases and presentations, and created standardized templates for relative valuation, DCF valuation, model rollovers, etc. for efficient, accurate and consistent output.



To know more about our Investment Research Services write to us on investmentresearch@sganalytics.com or contact us on **+1 315 503 4760**