

# BCA | Investment Research Solutions

STRUCTURED ▶ ACTIONABLE ▶ INTEGRATED

Bridging the gap between research and investment decision-making

## Case Study 1:

**Profile:** Global Investment Manager (GIM)

**Location:** London, New York, Tokyo

**Description:** Global Asset Manager with mix of retail mutual funds and institutional assets

*“In today’s investment management industry, research can no longer sit at the periphery with value locked in PDF reports – it must integrate directly into the investment process. BCA Edge and Analytics provide us with a competitive advantage through enabling us to access and transform insight into action faster.”*

## Background:

- › GIM uses investment research to support big picture macro analysis, asset allocation and trade idea generation
- › The team struggled with information overload, identifying relevant research, collaborating across teams and converting research into actionable insight
- › In addition, they struggled to manage research content in an effective manner
- › The firm was also looking for a solution to demonstrate research value to regulators

## Solution:

BCA EDGE with BCA Analytics

## The Challenge

As one of the world’s leading institutional investment managers, GIM understood the critical nature and value of investment research. The group had used BCA’s market-leading research for a number of years to support asset allocation, deep dive analysis and trade idea generation.

Like many firms, GIM recognised research as a valuable asset, but struggled to pro-actively manage content and effectively integrate research into workflow. Teams struggled with information overload, finding relevant research and being alerted to critical information in real-time. Furthermore, GIM was looking for ways to demonstrate research value to regulators.

## The Solution

Following a comprehensive review and evaluation process, GIM selected BCA Analytics and BCA Edge to create a research management solution that directly fit their needs. GIM’s selection of BCA Analytics and BCA Edge was based upon the view that “The platform represented a unique offering that surpassed alternatives in terms of the depth of valuable features, level of customization and unparalleled quality of the underlying research.” In particular, the use of semantic technology and manual categorization of content by Strategists created a powerful knowledge management solution.

## About BCA Research

*BCA is the leading independent provider of global investment research. Since 1949, BCA’s mission has been to support its clients in making better investment decisions through the delivery of leading-edge analysis and forecasts of all the major asset classes and economies, as well as educating, informing and stimulating discussion through clear and thought-provoking research. The firm maintains a head office in Montreal, with local offices in New York, Los Angeles, London, Hong Kong, Sydney, Cape Town and Buenos Aires.*

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## Personalization and Content Management

Working with BCA's dedicated digital specialists, each GIM user was able to tailor research to fit their investment approach and role through Edge's Dashboard functionality. Each user was able to access and track themes, views, trades, allocations and charts based upon their specific preferences. Through cloud-synced secure content management the same content could be clipped, stored and recalled from anywhere and any device.

## Workflow Integration

Prior to the implementation of BCA Analytics, GIM users created a manual for use in presentations and to drive investment decisions. Now, with BCA Analytics, they work with our research team to identify the most relevant charts and create custom books – including charts with BCA proprietary indicators, which could be customized and exported for use in presentations at a click of a button. In addition, users are automatically alerted when there are data updates.

## Collaboration

As a global team, GIM's investment professionals would often discuss research content to develop and share insights. Before implementing EDGE, the team would do this via email, calls, face-to-face meetings or print-outs. The insights were difficult to revisit or track over time. Through BCA's Digital Platform, users are now able to quickly annotate and share research content online to create deeper insights that can be accessed instantaneously.

## Analysis and Interaction

While GIM always appreciated BCA's independence, they wanted to reduce the time it took to connect the dots between themes, views and recommendations and understand underlying factors driving differences in views across strategy services. Through EDGE, GIM was able to couple the sophistication of our analysis with a simple and intuitive presentation layer, reducing the time and effort it took to consume and incorporate research into actionable insights.

## Search and Discovery

Prior to implementation, research content was sent directly to individual user inboxes in the form of PDF. The primary mechanism for finding research had become searching through inboxes for key words in subject headers and email bodies. One of the key requirements for GIM was to move away from this inefficient approach and provide the ability to find relevant research at the time it was required – be it for an asset allocation meeting, deep dive research on a new market, or answering a specific question. At the heart of our platform sits our intelligent search engine, which ranks content based upon relevancy to ensure you always find the content you are looking for.

Through our customizable alerting engine and saveable search filters, GIM was able to ensure they were always first to information and never missed out on key updates.

GIM always believed that research represented a competitive advantage for the firm, but often struggled to unlock the value or demonstrate it to stakeholders. Through BCA EDGE and BCA Analytics and with the help of

our digital specialists, GIM was able to design and implement an investment research solution that simplified and structured previously ad-hoc processes and directly met the needs of a diverse group of users.

## Benefits

- › High quality independent research on every asset class and region
- › Quicker and better informed investment decisions
- › Dedicated asset allocation support features
- › Save time converting research into actionable insight
- › Cloud-based content management to improve access and recall
- › Leverage next generation collaboration features to generate debate and deeper insights
- › Seamless integration with BCA Analytics
- › Clearly connect the dots on complex research context to validate and challenge ideas
- › Access your investment research on the road via mobile or tablet
- › Customize and use charts and research content within presentations
- › Capture investor sentiment on themes, recommendations and views
- › Demonstrate the value of the investment research to investors and regulators