

BCA | Investment Research Solutions

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Bridging the gap between research and investment decision-making

Case Study 2:

Profile: Global Investment Manager (GIM)

Location: Global

Description: Global Institutional Investment Manager with offices in over 70 cities, managing a broad range of investment products

“As a global investment manager, we see changes to regulation as an opportunity to drive competitive advantage. BCA Analytics and BCA Edge not only enables us to reduce regulatory risk, but also supports our drive to better manage information overload, research usage tracking and integration within investment decision-making.”

Background:

- › The firm used macro research in multiple locations
- › The firm was looking to identify a viable solution to manage research content and comply with regulatory changes that require investment firms to demonstrate the substantive value of research.

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 been using BCA’s world-leading research for a number of years to support asset allocation, deep dive analysis and trade idea generation. However, they felt the current process with PDF reports was highly inefficient.

Furthermore, with regulatory changes emerging, GIM was looking for an effective solution to quantify and track substantive research for regulatory requirements.

The Solution

Following a comprehensive review and evaluation process, GIM selected BCA Analytics and BCA Edge as a research management solution that directly fit the needs of their global team. 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.”

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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Regulatory Risk Reduction and Trend Analysis

Prior to implementing BCA Edge and Analytics, research was delivered to individual user inboxes in PDF format. No data was available on research readership and value. Furthermore, analysis on spending for some providers was undertaken on an imprecise and retrospective basis at the end of each quarter. Through the implementation of Edge, stakeholders were able to receive a monthly report, demonstrating not only which reports had been read and deemed substantive, but detailed analytics on which views, themes, trades and charts had contributed to decision-making at an individual user, location and firm-level. While initially this data was used to support spend analysis and regulatory compliance, over time the data became critical to understanding trends and behaviour and proactively support users in identifying relevant research content.

Personalization and Content Management

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

Workflow Integration and Collaboration

One key problem GIM's team faced before the implementation of BCA

Analytics was the need to recreate chart libraries on particular topics for use in presentations. Through BCA Analytics, we were able to create custom chart libraries to support asset allocation, which could be customized and exported for use in presentations at a click of a button. Furthermore, users were now able to quickly annotate and share research content online to create deeper insights that could 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 relevant research at the time it is 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 were able to ensure they were always first to information and never missed out on key updates.

Benefits

- ▶ High quality independent research on every asset class and region
- ▶ Quicker and better informed investment decisions
- ▶ Demonstrate the value and qualify substantive investment research to investors and regulators
- ▶ 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