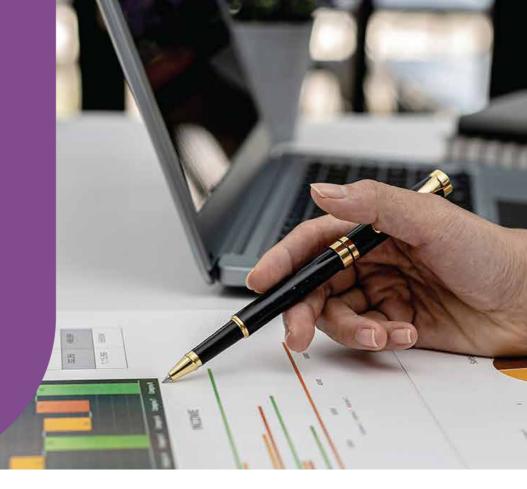


Analytics-Based Data Validation and SMART Dashboard to Scale Up a US-Based Investment Bank's Operations



Client Introduction

An eminent investment bank in the US with a diverse services portfolio, spanning asset management, commercial banking, equity research, and more.

Problem Statement

- Lack of specialized workforce with analytics skills to perform data validation and documentation review. Inadequate staffing to conduct due diligence for preparing financial models, LOIs, etc.
- Manual deal flow monitoring and reporting process hampered the visibility of deal dynamics, deal flow source, and fund details, impacting the investment opportunities and pipeline growth.
- No centralized dashboard to provide insights into valuation patterns, geographical analysis, sectoral evaluation, portfolio composition, etc.
- Manual tracking and updating of portfolio investments caused delays, errors, and information siloes, affecting operational agility and decision making. Also resulted in information quality issues.

Solutions Offered

Anaptyss leveraged its Digital Knowledge Operations™ (DKO™) framework to co-create agile business operations with global delivery capabilities.

Key solution delivered:

Analytics talent pool for data validation, financial modeling, & more.

Real-time fund tracking and monitoring with SMART dashboard.
Real-time fund tracking tale.
Portfolio analytics to analyze portfolio composition, NAVs, etc.

Business Outcomes



Want to explore our intelligent digital solutions for your business?

Write to us:

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