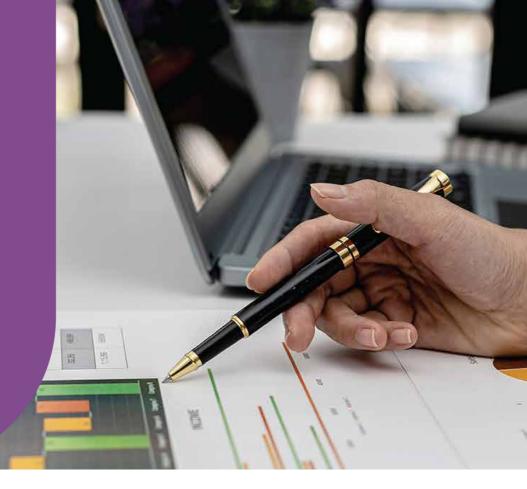


Analytics-Based Data Validation and SMART Dashboard to Scale Up a US-Based Investment Bank's Operations



## **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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