



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

Anatyss 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.



Automated, cloud-based access to financial reports, & more.



Portfolio analytics to analyze portfolio composition, NAVs, etc.

Business Outcomes



25% reduction in the operating costs



15% improvement in productivity & efficiency



Analytics-based data validation



Timely visibility into deal flow data

Want to explore our intelligent digital solutions for your business?

Write to us:

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