



ABOUT THE FIRM

At one of the largest providers of investment products in Europe, an asset manager primarily serves savings banks and institutional investors such as insurance companies, pension funds, family offices, foundations, and corporates.



THE CHALLENGE

- Need to expose institutional knowledge at the point of sale
- Broad range of non-standardized products
- Non-scalable internal operational processes



THE SOLUTION

- Intuitive digital user interface
- Access to FactSet's powerful modeling and risk optimization tools
- Consistent and connected data and solutions



THE RESULTS

- Increased productivity and efficiency
- Elevation of firm's industry reputation
- User-friendly consulting workflow

Asset Manager Empowers Its Sales Force with FactSet's Digital Advisory Solutions

A European asset manager partnered with FactSet to build an innovative and sophisticated digital strategic asset allocation tool to support the entire investment and sales process.

THE CHALLENGE

The Head of Institutional Consulting Solutions at a global investment firm manages a team responsible for the development of investment strategies for institutional investors. With a typical investment volume per client ranging up to billions, this customer group requires a complex and deep range of multi-asset class investments. However, customer advisors at the firm did not have the tools that would enable them to present clients with the optimal asset allocation options for their unique needs. This lack of transparency meant that advisors were left with a complicated and broad range of non-standardized products and prospective clients could not easily see the asset allocation decisions being made. This created complex, non-scalable operational processes that failed to showcase the firm's decades-long investment expertise.

FactSet delivered the advanced and flexible modeling framework needed to implement a sound, goal-oriented asset allocation process addressing the diverse requirements of their client base and capturing the entire sales process, from client onboarding to strategy recommendation.

THE SOLUTION

FactSet's solution combined powerful analytics with a bespoke digital front end that was seamlessly integrated into the firm's existing infrastructure, ensuring consistent market data across the firm. FactSet delivered the advanced and flexible modeling framework needed to implement a sound, goal-oriented asset allocation process addressing the diverse requirements of their client base and capturing the entire sales process, from client onboarding to strategy recommendation. FactSet worked with the firm to build a digital user interface that was intuitive for customer advisors on the institutional sales team as well as clients, surfacing only the most relevant portfolio and investment data derived through a robust analytical process. By incorporating the new structured consulting workflows into the portal, the firm was able to highlight its core expertise and enabled advisors to respond to complex client requests more easily.

“The potential effects of decisions are immediately visible and assessable. Our existing customers find this very valuable.”

Head of Institutional Consulting Solutions

THE RESULTS

FactSet's extensive portfolio and digital capabilities provided the firm with a modern, tiered technology architecture to guarantee efficiency, investment security, and reduced time to market. The asset manager is now able to distill complex, powerful, and quantitatively precise calculation routines and investment consulting workflows into a consumable, client-accessible user interface with intuitive visual appeal, “The potential effects of decisions are immediately visible and assessable. Our existing customers find this very valuable.” The product has increased productivity and efficiency and elevated the firm's position in the industry for serving institutional clients.

The consulting solutions team was very impressed with the high-level access they were given to FactSet's consulting and implementation teams during the planning and implementation stages. The teams worked in partnership in an agile project setting, collaborating on defining the overall solution, including designs, viewports, and custom business logic with subsequent implementation of required APIs, middleware, and portal front-end components. The collaboration and flexibility of the working relationship during this project has opened the door for future enhancements.

DISCOVER SOLUTIONS

FactSet creates data and technology solutions for investment professionals around the world, providing instant access to financial data and analytics that investors use to make crucial decisions.

FactSet Portfolio Optimizer

Optimize your portfolio across multiple asset classes at once.

[Learn More](#)

Digital Solutions

Create a custom digital experience for your clients and advisors.

[Learn More](#)