

EFG ASSET MANAGEMENT (UK) LTD PARTNERS WITH FACTSET FOR EQUITY AND MULTI-ASSET CLASS RISK ANALYSIS



FIRM TYPE

Private Bank

THE GOAL

A global private banking group seeks to further rationalize risk analytics for equity and multi-asset classes.

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EFG Asset Management (UK) Ltd seeks to further rationalize risk analytics for equity and multi-asset classes.

As the Head of UK Risk for EFG Asset Management in London—the asset management arm of global private banking group EFGS International—Russell Thornton is charged with analyzing fixed income, equity, and multi-asset class portfolios. With a growing focus on multi-asset class analysis, Thornton sought to introduce a new third-party risk solution to further rationalize risk oversight and streamline distribution of analysis across EFG. The solution needed to include white-glove service through the implementation process and beyond.

“One of the key things that encouraged us about FactSet was the training we knew we would receive on how to use this tool and the reassurance that we would continue to be supported for any aftercare needs, ensuring everyone was comfortable navigating the system and getting the most out of it,” says Thornton.

“FactSet is very flexible and offers manifold options throughout the different search platforms and its Portfolio Analytics,” Thornton says.

The Solution

FactSet’s robust risk analytics provide EFG with flexibility and sophistication

Familiar with FactSet as a service provider for his firm’s front office, Thornton decided to include its risk solution in his evaluation of risk partners. Following a trial period in which users tested FactSet’s ability to produce a wide range of analysis and comprehensive reports, they were particularly impressed with FactSet’s customization options and flexibility.

“FactSet is very flexible and offers manifold options throughout the different search platforms and its Portfolio Analytics. The reports can be customized, built, or combined with previously created data within FactSet, offering greater flexibility to create your own tables and columns,” says Thornton.

The Result

More efficient analysis and greater portfolio intelligence

Today, EFG Asset Management uses FactSet’s risk offering for their daily workflow. With feeds set up and information flowing to all relevant areas of the organization, Thornton is able to efficiently perform complex analysis and monitor daily data trends by using the FactSet portfolio dashboard.

“These are all things I would have looked at before FactSet,” says Thornton, “but with this new tool, I have a lot more flexibility with when I run the information and how I share it internally.”

“We’ve had weekly visits throughout the entire set-up stage. FactSet has come in and provided training to me and our other users on how to use the tools and technology provided. The service and support has been excellent.”



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