



ABOUT CHINA RENAISSANCE

With over 1,000 transactions equal to \$1 trillion USD, China Renaissance provides financial services to investors and new economy entrepreneurs across Asia and North America. By creating value and putting their clients first, China Renaissance has generated an AUM of over ¥61 billion RMB (\$9.42 billion USD) in new economy investments. With a robust international network, China Renaissance connects China's capital markets with the rest of the world.



THE CHALLENGE

- Needed to comply with federal regulations in two regions
- Required vendor with strong presence in local China and global market
- Experienced prolonged time to market



THE SOLUTION

- Individual databases capable of satisfying federal regulations
- Unified report workflow between China and Hong Kong offices
- Automated RMS Partners model equipped for go-live date



THE RESULTS

- Reduced time to market using sustainable system
- Created flexibility in managing research templates, research workflow, and client access portal
- Consolidated workflow for co-branded report publication

China Renaissance Broadens Chinese and International Market Reach with FactSet RMS Partners

FactSet Partners enables firms to quickly execute expansion plans for global research products and trading.

THE CHALLENGE

The research team at China Renaissance is highly experienced in onboarding and supporting global clients. Its main objective is to generate innovative investment ideas while providing clients with flexible and highly configurable solutions. To further this goal, leadership at the firm sought to grow its business swiftly to reach more clients in China and throughout international entities.

Partnering with a vendor that had a strong presence internationally and locally, with the ability to support China Renaissance's proposed time to market was imperative. The vendor also needed a reliable database that could satisfy three different sets of regulations from Hong Kong, China, and the United States. The firm also required a research distribution system that could identify their client's preferences for financial advice and product news.

Through Partners' integration with the firm's AI engines, the research team was able to easily distribute documents across various channels and analyze their reach through readership statistics.

THE SOLUTION

Following a thorough RFP process, the research team selected FactSet RMS Partners to streamline their research-creation process and expand their global reach. To stay congruent with the different regional provisions and federal regulations of Hong Kong and China, FactSet created two database instances, each equipped with local reporting and compliance monitoring to keep each team adherent. To further support compliance efforts, FactSet Partners was fully integrated with Microsoft Office to help the China Renaissance team prepare presentations and reports for auditing.

With the overarching goal of enhancing their client outcomes, the research team integrated Partners with their internal CRM and bespoke data model providers. By doing this, the team was able to use client records to automatically target their customers with relevant financial advice and research documents. This was done by using Partners' targeted distribution abilities to upgrade the firm's traditional push model. Through Partners' integration with the firm's AI engines, the research team was able to easily distribute documents across various channels and analyze their reach through readership statistics.

THE RESULTS

Implementation of the system was painless and laborsaving with the local support of FactSet in China. By installing in shifts to meet the requested go-live date, the research team was able to access the core system first and targeted distribution and further template and system configuration in a second phase. China Renaissance launched the program in China and Hong Kong within the planned timeline and budget despite the COVID-19 pandemic. With the help of FactSet, China Renaissance became the first global broker to have a research production and distribution platform under the same brand.

"We value our strategic relationship with Factset which allows us to be ahead of the extremely competitive sell-side landscape."

KEN LEUNG,
Managing Director, Chief Operating Officer

With an intelligible configuration tool for their research templates, the team can flexibly make small changes that previously took days to complete. They also have more control in managing client access to their portal by using targeted distribution.

FactSet Partners has simplified the reporting process that is used to meet the requirements of each distinctive region's regulations. As a result, the firm has been able to double stock coverage without the need to deploy additional employees in both locations.

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 Partners

Streamline your research process by combining your analyst's model data with market data.

[Learn More](#)

Research Management Solutions (RMS)

Augment your global research with a comprehensive suite of investment research management tools.

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