

30+ hrs
Saved Every
Week

Increased
Analysis
Bandwidth by
~50%

News Automation Support to an Asset Management Firm

Client Challenges

A mid-sized portfolio manager based in Canada need regular key updates on the coverage companies. Unfortunately, due to limited resources in-house, portfolio managers sometimes may miss out on an earnings update for two or three days after the covered stock has been released it. Even then, the team might not have time to cover the company at all. The process was inefficient and hindered portfolio managers from making the right investment decisions.

Project Methodology

First, our team streamlined and part-automated the process for aggregating news. Further, the content was optimized from every news source and sent to the analysts who would then review and prioritize news based on its impact on the portfolio firm itself.

To help with newsletter publication, we developed an Excel tool using macros written in VBA to automatically generate headings, body text, and links for news items. We automated factual reporting and simplified the reporting template to focus on key factors that were likely to affect the investment position.

Impact Delivered

- The fast-paced semi-automated newsletter dispatched to the analyst enables timely decision-making.
- The same level of coverage was maintained, and the portfolio newsletter became even more impactful. However, time spent on news aggregation and distribution fell by nearly 50%.
- Instead of being bombarded with raw data, portfolio managers now receive a much more focused analysis, with actionable insights.

