

3000+
Manhours
Saved

30+
Stock
Initiations

Equity Research Support to UK-Based Family Office

Client Challenges

- A London-based family Office wanted to conduct a thorough assessment of their portfolio stocks to determine their viability and fitment based on their investment ideology.

Project Methodology

Haanuwise deployed sector-agnostic analysts to assess the current stock portfolio holdings.

- An in-depth analysis of companies was conducted to determine the intrinsic value, key revenue drivers, operating metrics, competitive landscape, and FCF-generating capabilities.
- Insights from Industry experts were considered while doing the predictions and forecasting operating and financial drivers.
- Industry trends and macroeconomic factor analysis of the current market was provided to the client, which helped them make informed decisions.

Impact Delivered

- Research reports on initiating coverage, coverage maintenance, earnings updates, expert and management interactions, and industry or sector views.
- Increased client productivity levels with regular updates on key factors driving the stock performance in the portfolio.
- Provided 30+ stock initiations to the client with detailed research and recommendations within a quick turn around time.

