

# Centralizing Research and Risk Management for Decision-Making

## Client Background

A global hedge fund, who started with EDS in 2020 with ~\$500 Million in AUM. As of 2024, the fund has a deep fundamental investment strategy across \$2+ Billion in AUM.

## The Challenge

While the investment team was actively using third-party software to manage their research, including Research Management (RMS) and Risk Management, their solutions did not fully meet their expectations and were too costly.

Specifically, their research management solution was inadequate – a basic repository for emails and notes, no real-time data, content was limited and most importantly, it lacked the framework needed to make it truly usable and valuable. There was little incentive to really engage with the solution. While data was centralized, the COO found it difficult to search and monitor content for regulatory purposes.

On the Risk side, the firm relied on their fund administrator's solution for exposure, decomposition and return attribution analysis. While competent, it was heavily Excel- and paper-based (PDF), lacked personalization, did not operate in real-time and was very expensive. The proactive vision they had for risk was very difficult to achieve with their current solution.

These separate software solutions also did not talk to each other, nor share data, which reduced collaboration and made piecing stories together more difficult. The team felt they were missing opportunities and risks.

The team sought a flexible, user-friendly and cost-effective solution to centralize, and on their terms, organize and visualize internal and external, core decision-making intelligence including ideas, financial models, notes, documents, market data, risk data, etc.

## The Solution

The firm streamlined what had required multiple applications, vendors and manual processes into one, centralized, yet flexible platform across Research Management (RMS) and Risk Management, while importantly working seamlessly with other in-house critical processes. The processes were fully integrated, with the ability to view and share data between the workflows, allowing the team to get the full picture, quicker and easier.

**“We were able to modernize our workflows with minimal disruption and securely in-house, which were two must haves when we were looking for a solution. Having our investment process all on one, integrated platform made a world of a difference in working with our intelligence to drive best decisions.”**

**- Chief Investment Officer**  
Large Global Hedge Fund

## The Result

The firm successfully transformed operations and saw significant growth by streamlining research and risk workflows through a unified platform with EDS. This integration enabled the investment team to capture and organize real-time data efficiently, enhancing decision-making and eliminating inefficiencies in fragmented processes. Safeguarding intellectual property in-house ensured robust compliance, allowing the team to focus on scaling their alpha generation and refining investment strategies.

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**Let us know how we can help you.**

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