

# Implementing a Modern Research Management System (RMS) for Better Decision-Making

Client: Canopy Investors

## Client Background



Canopy is a 2024 long-only equity launch, spinning out of a large, global equities asset manager in Australia. Canopy Investors is a boutique global small and mid-cap equities manager investing in high quality companies trading at attractive prices. With its fundamental, technology-enabled, and collaborative investment approach, Canopy aims to grow and shelter investors' wealth over the long term. Canopy was founded by Kris Webster and Michael Poulsen, who partnered with Bennelong Funds Management in 2024. The team has more than 40 years of collective experience investing in listed global equities and has worked together for more than a decade. Together the team manages the Canopy Global SMID Fund, which invests in a concentrated portfolio of high quality small and mid-cap companies across a range of sectors and global markets.

## The Challenge

Canopy was looking for software that can help manage their data and investment process to provide insight for future decision-making and process improvement, as well as to give comfort to clients around the repeatability of their process. The deeply experienced fundamental founders were searching for the most efficient and effective solution to execute their visions. As a startup, they wanted a cost-effective solution that can grow with them and across the investment process lifecycle. The firm has seasoned, successful managers with a strong track record built on a disciplined investment process framework. The firm relied heavily on fundamental analysis, including a mosaic of internal and external intelligence, from many different sources, as well as specific methodologies for valuation analysis and position sizing. They were looking to fully leverage AI-enabled technology with a deep base of internal intelligence including investment theses, research notes, meetings, financial models, forecasts, etc. This was the heart of their decision-making as the selection of the "right" long-term partner would be an important part of their success.

## The Solution

EDS provided a full production solution within a few months before a commitment was made. During this process, EDS demonstrated both configurability in how the platform was organized, as well as proved ease-of-use and flexibility to data inputs. Critical test areas included the creation of a proprietary screening process, automated financial model ingestion, as well as analytics to provide feedback on where they succeed and where the blind spots are. This also included templates set up to give walk-throughs of assumptions to calculations such as price targets.

**“Canopy Investors’ investment process involves capturing, analysing, and visualising lots of our own data, as well as third-party data. As we were looking for partners, EDS stood out as the most modern, customisable, and scalable platform. And it continues to evolve at a rapid pace.”**

**- Kris Webster, Portfolio Manager**  
Canopy Investors

## The Result

The firm adopted a centralized, yet flexible solution for research management, which works seamlessly with other in-house critical processes and with the ability to use the same platform for other workflows as they needed. With their RMS solution aligned with their vision, they can maximize the value of their research and intelligence to enhance decision-making and drive continuous improvements. All internal and external content is captured in real-time and can be configured and organized multiple ways, into templates and/or powerful dashboards, for real-time and historical reporting and analysis. EDS replaced what would have taken multiple, separate processes, including spreadsheets and possibly multiple vendors – while providing a user-friendly, productive environment with a strong feedback loop.

**“EDS really understands our needs and has been great to collaborate with. We are thrilled to be able to leverage their advanced capabilities to automate our investment process, allowing us to support our critical processes, make better investment decisions off the bat, and scale, as we grow.”**

**- Michael Poulsen, Portfolio Manager**  
Canopy Investors

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

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