

Spinning Out of Another Fund/Multi-Manager

Client Background

The firm is a 2023 Tier one, multi-billion dollar launch, spinning out of a \$60 Billion hedge fund.

The Challenge

Implementing equivalent (and better) investment processes and tools with fewer resources.

The deeply fundamental and risk management focused founder was searching for the most efficient and effective solution to replicate (and enhance) the technology resource footprint received at his prior firm.

Specifically, their risk process includes multiple content vendors, and included multiple workflows, calculations and outputs that are critical to their decision-making framework. They needed a flexible and extensible solution, or to hire additional people and build it themselves.

Beyond risk, the team wanted a scalable solution, across other workflows, that they could grow with, to centralize and organize/visualize internal and external decision-making intelligence, including market data, internal forecasts (financial models and notes), risk data, etc.

The Solution

The fund chose a high performance, real-time, easy-to-use and configurable Risk Management solution from EDS – implemented with precision, quickly and affordably. It was built around their vision and investment process, streamlining workflows, providing valuable feedback, and supported by a highly experienced team of former investment professionals and quantitative analysts. They started with a low-risk, proof of concept (POC) that required minimal commitment from the client and proved the value upfront. In 2023, They began their journey with EDS implementing Risk Management and added Portfolio Construction and Research Management (RMS) shortly after in 2024.

“As a multi-billion dollar spin, out of a \$60B tier one fund, we found EDS’s solutions uniquely scalable, efficient, and flexible. Despite having resources to build in-house, EDS expedited our market entry aligning with our strong risk management principles.”

- Portfolio Manager
Multi-Billion Dollar Hedge Fund

The Result

Within a year of implementing EDS, the hedge fund transitioned to an all-in-one solution that optimized risk oversight, portfolio structuring, and research activities. The integration allowed for more informed decision-making, as risk data could be tailored to the firm’s unique requirements, from individual analyst insights to comprehensive fund-level analyses. EDS’s flexible application improved operational efficiency, making risk processes more strategic and insightful, while maintaining data integrity and regulatory compliance.

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Let us know how we can help you.

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