

## ASSET MANAGEMENT AND INVESTMENT ANALYSIS IN FINANCIAL SERVICES

Unlocking present activities for future gain

### CHALLENGE

Financial institutions are facing increasing pressure to maximize return on existing investment and improve the ability to spot and seize new opportunities for increased revenue. For asset and investment managers, this requires insight into questions such as: Which investments are under performing; Which funds are experiencing portfolio drift and why; What is the exposure to companies, industries, and related securities most affected by the recent economic crisis; What is the forecasted level of redemptions etc. There is a need to reduce investment transaction costs and identify areas of inefficiency. Sales and relationship managers can also use analytics to improve performance and encourage the distribution of new products or high-margin cross-sells.

### SOLUTION

QlikView and the partner community have built a number of 'QlikView Apps' to address and demonstrate capabilities related to this solution area. *QlikView for Asset Management and Investment Analysis* apps allow business users to make faster and better informed decisions by allowing them to:

- Analyze portfolios down to individual position level while comparing performance and costs by broker, portfolio manager, fund, sector, market and other dimensions
- Understand performance and analyze scenarios across asset classes including Equities, Fixed Income, Foreign Exchange and Alternatives
- Incorporate external industry and market data to investigate scenarios related to interest rates, FX rates and commodity prices to manage risk and ensure more balanced portfolios
- Interact and collaborate with investment professionals including external clients to improve servicing and cross-selling

### CUSTOMER EXAMPLES

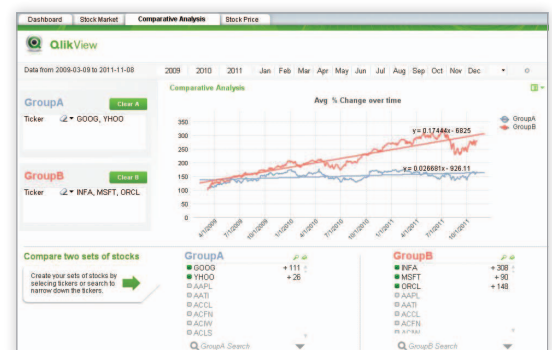
- A leading UK asset manager deployed QlikView in over 40 business areas including AUM, Attribution analysis, Performance analysis, MIS, Fees and money movements, Asset class/Asset exposures, Operational dashboarding, and others
- A global asset management firm analyzes over 1 billion rows of investment data in a single QlikView application and compressed 50+ GBs of data to <10% of its original size in QlikView
- ABN Amro Banque Neuflyze OBC Investments realized 120 staff days saved in preparing reports for monitoring application of procedures
- A leading European investment manager eliminated manual Excel processes and replaced it with QlikView for all of their exposure and market risk analytics



Example: Asset Management App

“The applications have been far wider than we hoped for when we made the business case. Qlikview has reached into almost every area of the business in some way”

IT Manager, Ruffer Investments



Example: Financial Stock Analysis App

### ABOUT QLIKVIEW

QlikView is the leading Business Discovery platform, delivering true self-service BI that empowers the business user by driving innovative decision-making.

Contact your QlikView representative to schedule a discussion and live demonstration related to this solution area.

Visit us at: <http://www.qlikview.com/us/explore/solutions/industries/financial-services>