

Customizing at scale: Efficient delivery of model portfolios

Client

A global asset manager managing in excess of \$500b of assets under management

Problem

Communicate model portfolio behavior over various market cycles to an increasing number of investment advisory clients.

The Portfolio Analytics team needed an efficient and scalable solution to share model portfolio reviews, including proprietary risk analytics, with the end client.

The Asset Manager [firm] faced growth across both their domestic and international client base. With an ever growing market to serve, and ambitious goals to expand reach, the firm needed a tool that enabled consistent and scalable processes across numerous teams to deliver and service their suite of model portfolio clients.

The firm's model team is tasked with delivering customized model portfolios at scale whilst at the same time ensuring that their offering is differentiated to that of competitors. With significant growth in their global target market, they inherited a lack of integration between internal stakeholders and systems.

Existing systems did not allow for customization at scale and failed to effectively communicate their proprietary investment process. The result was an inefficient excel based workflow, with analytical output manually pasted to Powerpoint presentations.

The Portfolio Analytics team in particular, known for providing high touch service to their clients, found this to be a challenging process as they needed a cohesive and impactful way to display the differentiated investment solutions offered.

Solution

Jacobi's configurable platform enabled more meaningful analysis of portfolios at scale by delivering bespoke, historical and forward-looking analytics in a fully integrated visual environment.

The integration of Jacobi's configurable platform provided the various teams a centralized, reliable, and digitized environment to review, build and manage customized model portfolios and generate production ready client reports. These reports include powerful, and highly configurable historical and forward-looking analytics to support a more meaningful narrative around each model's particular objectives.

Through the Portfolio Builder application, Jacobi has improved efficiency, scalability, collaboration and governance across the firm with a positive net impact on client engagement.

Outcome

The delivery of model portfolios are streamlined and easy to manage and offer clients a differentiated personalized investment solution.

Differentiated investment solution

Distribution & commercialization of investment IP

Investment process efficiency

Customization as scale

Strong governance & permissioning

For more information on Jacobi's highly customizable technology to support the scaling of investment processes and client engagement, please contact us or visit www.jacobistrategies.com