

Enhancing Portfolio Management Selections

Challenge and Opportunity

A portfolio management entity was seeking a new model to anticipate financial performance of specific investments.

Approach

- The customer manages over \$82 billion in retirement assets for over 730,000 individuals and wanted a new predictive model on financial performance of specific asset classes and investments.
- Using ML, our team generated predictions using the patterns extracted from existing financial performance data.
- That data was able to create a comprehensive model that supported the portfolio selection process for the customer's team.

Results

The customer is extremely satisfied with the new model which has proven accurate in the portfolio selection process.

50+

Clients Served*

20+

Data Services Offered

185%

Average ROI
Based on 2 years of cost decrease or revenue increase over consulting fees *

(excluding internal implementation cost)