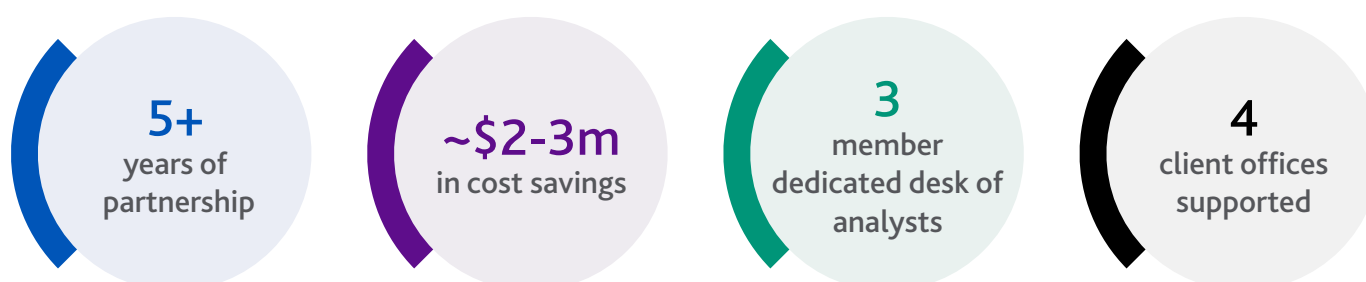


## Private Equity (Co-investments Monitoring)

GLOBAL PE FOF FIRM HEADQUARTERED IN THE US



### Client requirement

- » A leading global FoF manager with around \$11bn of AuM across its 5 funds was looking to migrate co-investments data to an online platform to easily monitor and update data on a regular basis
- » The client extensively used its internal team to manage and monitor a large portfolio of co-investments
- » The monitoring exercise involved sourcing, aggregating, and scrubbing relevant reporting materials, thereby engaging its internal team extensively
- » Of the total, 80% of data was saved in silos, impeding real-time availability of data for analyses and reference
- » Moody's Analytics Knowledge Services partnered with the client in 2011 to migrate the entire data on the customized platform based on Salesforce and provided the following benefits:
  - Our experienced research team managed data migration across the new platform and provided customized dashboard reports as required by fund managers
  - We also provided efficient turnkey solutions for the client to reduce the high cost of storing and updating data on a regular basis

### How we solved the problem?

- » Identified key client objectives and prepared a detailed roadmap with tangible milestones
- » A senior team member travelled to the client site for a week to analyze the data onshore and discuss key objectives with the client team
- » An offshore team uploaded the data (PDF documents, scanned documents, etc.) to Salesforce using best data migration practices
- » Implemented strong quality check processes to ensure that data quality was 100%. The project team is now mandated to manage data

### What we did differently?

- » Aligned industry/product teams to provide value-added support with strong integration
- » Enabled the client to migrate to a new platform without investment in an onshore workforce
- » Facilitated the client with competitive advantage using a robust functionality platform to store and analyze data
- » Saved USD2-3mn in costs over the last 5 years

#### ABOUT MOODY'S ANALYTICS KNOWLEDGE SERVICES

Moody's Analytics Knowledge Services, a division of Moody's Analytics, is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 200 financial institutions and consulting companies through a team of over 2,600 subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.

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