

D&A TRANSFORMATION TALES

Implementing a Dynamic Suite of Data Visualization Capabilities for a Global Asset Management Firm



BACKGROUND

Our client is a leading global asset management group offering investment solutions through established funds and customized portfolios. With a core competence in alternative investments, the firm manages a diverse range of assets and portfolios for a global clientele. As the business grew, the firm faced challenges in effectively analyzing and reporting on the performance of their investment portfolios, hindering their ability to make informed decisions and provide seamless experiences to their clients.

The core objectives of this collaboration were to:

- Implement siloed automation to gain a comprehensive view of portfolio information.
- showcase portfolio information to effectively communicate performance and make data-driven decisions.
- identify strengths, weaknesses, and opportunities for optimization
- Build interactive dashboards and screens with the ability to slice and dice data
- Generate and automate additional scheduled and ad-hoc reports



SOLUTION

Our team of data analytics experts collaborated closely with the client to understand their unique business requirements and pain points. Our experts conducted in-depth workshops and stakeholder interviews to capture detailed requirements and gain a deep understanding of the client's data landscape and reporting needs. Here is our unique approach to the client's presented challenges:

- **Oracle BI-based Application:** A hosted Oracle Business Intelligence (BI) application, providing a centralized platform for portfolio data analysis and reporting.
- **ETL Tools:** Implementing robust ETL (Extract, Transform, Load) tools to seamlessly load portfolio data from various sources, ensuring data integrity and timeliness.
- **Customizable Dashboards and Widgets:** Developing interactive dashboards and configurable widgets, enabling portfolio managers and stakeholders to visualize and analyze data in a tailored and intuitive manner.
- **Analysis Framework:** Implementing a robust analysis framework that catered to all ad-hoc and canned reporting needs, enabling flexible and comprehensive data exploration.
- **Operational and Maintenance Support:** Providing dedicated operational and maintenance support for two years after go-live, ensuring seamless adoption, user enablement, and ongoing system optimization.



TECHNOLOGY SNAPSHOT

- Oracle Business Intelligence Enterprise Edition 11g
- Oracle Data Integrator
- Oracle 10g and Oracle 11g database



BUSINESS BENEFITS

- A unified view of portfolio information to make informed decisions
- Interactive dashboards and advanced analytics capabilities
- Automated reporting processes and the ability to generate ad-hoc reports streamlined operations



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