



Firm Profile:
Investment Bank

Geography:
US

eVestment Client Since:
2016

Subscriptions:
Advantage, Analytics,
Asset Flows, Holdings
Analysis, Scorecard

The Business Advisory Services unit of Citi serves a diverse range of clients in the asset management industry, from small start-up hedge fund managers to large institutional size funds.

The group publishes thought-leadership pieces and industry research on the asset management sector. They also provide clients with comprehensive consulting and advisory services to support them through all phases of their growth and maturity.

Citi Business Advisory Services subscribes to eVestment's full suite of data and insights solutions to aid their creation of monthly and quarterly industry research, and their client advisory service.



CASE STUDY

Citi Business Advisory Services

A broader perspective

The team at Citi was attracted to eVestment's data and insights solution as they required a view of global trends to ensure they continued to provide valuable support to their clients. They were utilizing a lot of data sources, but needed a platform that gave them a broader perspective.

"We were pulling in a lot of data streams from various providers to aid in our research, but we didn't feel we could get a wide view of how products and universes are performing, or attracting flows," said the Director of the research team. "We were hard-pressed to have a holistic solution for tracking the asset management industry."

The breadth and coverage of the asset management industry eVestment's data provided was the differentiator from the team's other sources.

"The key difference between our other sources and eVestment was the broad coverage eVestment provided. In terms of having a platform that has a 'one stop shop view' of where the asset management industry is heading, eVestment is the most comprehensive tool out there."

Ahead of market trends

Tasked with advising a large and diverse client base, the team need to stay informed of current and emerging industry trends. They also need a clear view of their clients' performance and position in the market, which eVestment helps facilitate.

"It's hard for me to think about the number of clients a bank like us has to cover in the asset management perspective and the thousands of different products that they run as a group."

"eVestment really helps us identify where these clients may be having some challenges or may be experiencing significant growth. It helps us scale our services and connect to them in a really informed way. Having a resource where we can see the trajectory of a firm from our top-down perspective is very helpful for us."

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Director,
Business Advisory Services

Underpinning research

eVestment has fitted seamlessly into the Business Advisory Services' current process and is now an integral part of their research.

"eVestment is the first starting point and the underpinnings to our research. It's a great holistic platform in tracking the asset management industry and goes a long way to covering a vast majority of the universe. We're not going to go to the other ones for our first stop in terms of analysis of how products are performing and attracting or not attracting flows."

Ease-of-use

The team also spoke to the ease-of-use of the eVestment platform.

"eVestment provides the data we need in pretty great user format and a nice front end. The interface is intuitive."

Another key requirement for a solution was the ability to export analysis from the platform to include into reports and client presentations.

"What's really important is that we can pull data out of eVestment and provide client-level reporting very easily." Whenever the team have required the support of eVestment's client service team, the experience has been more than acceptable.

"The client service team is superb, excellent. Best in class and certainly responsive. Whenever we've gone out and asked them about a specific research request or asked for help on becoming more familiar with the capabilities, they have continually exceed expectations in terms of delivery and responsiveness."