

Optimize decision-making while improving productivity.

Client:



Client Background

Pzena Investment Management is a value-oriented investment management firm with over \$50 billion in AUM. Since its inception in 1995, the firm has employed a disciplined, research-driven approach to long-term value investing and has subsequently built a diverse, global client base. Pzena follows a classic value investment philosophy; as such, they seek to invest in good businesses at low prices, focusing exclusively on companies that are underperforming their historically demonstrated earnings power.



The Challenge

In the journey to modernize their workflows and data infrastructure, Pzena sought to develop scalable solutions that would enable the consistent capture and storage of data generated throughout their investment process. The target state would allow them to generate insights on their decision-making across the investment lifecycle and facilitate efficiencies in areas of the business dependent on this data.

Pzena ultimately wanted a feature-rich user interface and data environment to efficiently store information generated by multiple internal and external systems. Further, they wanted to seamlessly analyze this information to generate understanding and insights. Pzena was acutely aware of the complexity and resource commitment needed to take this task on internally and needed to execute with minimal impact on day-to-day operations.



The Solution

EDS proved well suited for Pzena's needs, and beginning in 2020, started working with Pzena to improve their investment process management (IPM) system. Leveraging our technology platform, EDS offered flexibility, performance, and domain expertise to modernize Pzena's investment management data infrastructure in a cost-effective manner. EDS helped them achieve their goals with very little of the friction they had expected. EDS made it easy to get started through our unique POC program, where value is proven upfront. Pzena was able to quickly achieve their goals, and given the results, they have increased their utilization of EDS and expanded the scope of our services.



The Result

Our IPM platform improved the speed and efficiency of Pzena's end-to-end investment process. It has automated a previously manual Excel-based workflow and has been configured to improve data availability, while providing a single pane of glass for information used by the investment team. The EDS platform helped Pzena achieve their goals by modernizing, scaling, and streamlining related operational processes. It gave Pzena's investment team a more intelligent and efficient solution to assist in the portfolio construction and management process. The system also provided them with the historical data and analysis capabilities necessary to improve decision-making and vastly improve the speed of reviewing their portfolios. EDS' solution offered lower cost, higher performance, and faster results.



We are excited about the announcement between two of our trusted partners, Equity Data Science (EDS) and Northern Trust. EDS has helped us build additional insight into our investment process, while we have long valued Northern Trust's support as we grow our business.

- **Brian Mann,**
Principal, Pzena Investments

Let us know how we can help you.

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