

# Scaling an Integrated Investment Process Solution for Growth

## Client Background

A global fundamental hedge fund manager with \$1 Billion in AUM in 2017 when their journey with EDS began. In 2023, the fund's AUM is more than \$3 Billion.

## The Challenge

The investment team set out to improve the capabilities of their disciplined, yet heavily Excel-based investment process, and to help them drive more success from it. Because it was heavily Excel-driven, it lacked the ability to analyze historical decisions and inputs, which was a critical need in order to drive the best performance possible. In addition, their intelligence gathering process was too fragmented and spread out across Excel, Word, email and other systems. They felt they were missing opportunities and not seeing the risks. The team sought a system to centralize all internal and external intelligence, including ideas, models, price targets, shared screening/ranking Excel sheets, all notes and thesis documents, broker research, etc. and any other content that was core to decision-making. With no obvious solution in the market at the time, the CIO sought to hire a data scientist or team capable of building a scalable solution, but had significant concerns about the cost, commitment, and transition process taking center stage. Above all, this very successful fund did not want to create friction with the investment team.

## The Solution

A high performance, easy-to-use and configurable workflow solution built around their investment process – implemented quickly and affordably – streamlining and eliminating Excel processes, providing valuable feedback, and supported by a highly experienced team of former investment professionals and quantitative analysts. They started with a low-risk, proof of concept (POC) that required minimal commitment from the client and proved the value upfront – especially that their team didn't need to change any behaviors.

**“EDS is like a real-time investment committee.”**

**“With the EDS Platform, our deep fundamental process is centralized and measurable – like having our investment team together 24/7, making sure our portfolio always represents our best and highest conviction ideas.”**

**- Fund Chief Investment Officer**  
\$3+ Billion Global Hedge Fund

## The Result

Since 2017, EDS helped the firm more than double its assets and streamline investment processes. By consolidating scattered data across various formats, EDS delivered a comprehensive framework for portfolio construction, idea generation, and risk oversight. This approach led to more agile decision-making, cost efficiencies through vendor reduction, and the seamless adoption of optimized workflows across the firm. Fast implementation enhanced transparency and accountability, securing compliance with industry standards.

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**Let us know how we can help you.**

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