

# Research Management Solution for a US-Based Hedge Fund



## Overview

A New York-based hedge fund with \$3.8 billion AUM across distressed, event-driven and CLO credit strategies approached RFA to redesign their proprietary research management system (“RMS”).

## The Opportunity

- ▶ The manager’s current platform was costly to maintain due to outdated architecture.
- ▶ The proprietary solutions also made the system costly to maintain and unable to meet future research requirements.

## The Challenge



There were **few synergies** among the different software applications being used. The result was a continued reliance on manual processes that were becoming increasingly costly as the firm added research capabilities and developed programs in new areas.



Collaboration between research analysts and portfolio managers was also much **less extensive and productive** due to patchy integration across mobile, cloud and other access points.

## RFA Solution

After a full audit and needs assessment, RFA undertook a two phase implementation over six weeks.

### 1 The discovery process

RFA documented the existing business process, then assessed how to improve the process and designed the new information architecture

### 2 The execution of the rollout

RFA migrated the architecture seamlessly from the existing framework to the newly developed set-up leveraging migration scripts

- ▶ This approach capitalized on the native synergies between Microsoft OneDrive, SharePoint Online and the Office 365 suite to automate previously manual processes using Flow.
- ▶ The new system also enhanced productivity by providing instantaneous access across mobile, cloud and native libraries.
- ▶ This allowed analysts, researchers and the wider team to more easily share their data with portfolio management teams and become substantially more collaborative in both research and portfolio management.

## Result



RFA created a more efficient, cost-effective and future-proofed RMS solution by designing custom MS Flows that leverage the Office 365 stack and Share Point Online’s document management capabilities.

The new system organized documents by ticker and created a document library site. It also integrated with user emails, database subscriptions and other information sources, while automating data pulls and deploying them into a cohesive single-source library.

