CASE STUDY

FE Analytics boosts efficiency for Craven Street Wealth

How Craven Street Wealth use FE Analytics to streamline portfolio management and client reporting and unify their CIP

Background

Craven Street Wealth is an independent wealth management firm providing holistic financial planning to individuals, families, and businesses across the UK from offices in Oxford, Bedford, Kent, Sussex, and London. After a period of rapid growth over the last three years, including integrating a number of firms, it now stands with £3bn AUM and 50 advisers.

Keith Perry, Head of Investments, has been managing investments for thirty years and now heads up the central investment team. Thirty years ago, before FE Analytics, Keith found it hard to bring fund data into one place for analysis. At the time, this meant using various different PDF lists and a lot of manual rekeying. But the three decades he has been using FE Analytics have brought wholescale changes to the advice landscape and, recently, the firm has grown rapidly.

Objectives

The investment team at Craven Street need FE Analytics to help them deliver a single centralised investment proposition of multiple providers and DFM partners. For such a quickly growing firm, it's key that all advisers have access to a quality and consistent offering. This means the tam need to be able to support advisers with detailed charting and analysis, enabling sophisticated, client-friendly reports and presentations.

Whole of market fund analysis

Quick fund charting and comparison

Custom reports and workflows

Client-friendly performance reporting

Risk profiling

Achievements

FE Analytics has enabled Craven Street Wealth to unify the CIPs of the various firms they have integrated while working with 20 different platforms and a number of DFMs and increasing AUM from £1bn to £3bn. As well as streamlining operations and reducing manual processes, FE Analytics helps the team deliver faster, more accurate client insights to showcase the power of the CIP.

Powerful marketing and analysis: historical data helps showcase the track record of the CIP and supports pitches to new and existing clients.

Efficiency gains: Enhanced portfolio and fund analysis reduces manual workload, allowing the Central team to serve a growing number of advisers.

Enhanced client experience: The centralised investment team are able to support advisers with detailed requests, allowing them to focus on clients.

Improved reporting: Client reports are generated faster and more consistently, enhancing service quality and transparency.

Risk management: Advanced analytics tools, including stress testing and scenario analysis, strengthen investment oversight and compliance.

Whole of market fund analysis: Real-time and historical fund data allows the team to quickly create reports and charts and also dive in for deeper analysis.

Operational growth: Faster insights support scalable service delivery across multiple offices without additional resources.

10% time saved

every day with IO integration alone

If we didn't have FE Analytics, we couldn't do what we do. So it is an enabler rather than just being a time saver...You couldn't go water skiing without water skis, could you? Well, I couldn't do charting without FE Analytics.

Keith Perry
Head of Investments, Craven Street Wealth

FE Analytics is your one-stop tool for all your fund research, analysis, portfolio construction, due diligence and ongoing monitoring. We transform everyday challenges into opportunities for expansion with data-led solutions and established industry expertise.

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