

CASE STUDY

FE fundinfo



Faster Fund Research and bringing MPS to market with FE Analytics

How a leading UK investment consultancy improved research efficiency and grew market reach through FE Analytics and the MPS Directory.

Background

Isio is a UK pensions, investment and wealth consultancy advising major institutional clients and the retail wealth market. Its fund research team needed a faster, less manual solution to support fund selection, due diligence and competitor analysis. They also wanted to bring a new range of MPS products to market and increase their brand recognition within the retail investment space, ultimately leading to increased AUM through financial advisers.

Objectives

Isio wanted to enhance research efficiency and streamline workflows through improved data access and quick, high-quality reporting capabilities while increasing Isio market visibility and adviser reach.



Research efficiency



Data access



Streamlined workflows



Quick, high quality reporting



Market visibility



Adviser reach



Competitor analysis

Achievements

Isio improved their research speed and streamlined reporting by adopting FE Analytics for research and reporting. They also bring their portfolios to a wide audience of financial advisers through the FE Analytics MPS Directory and increase the quality of pitches with compelling reporting.



Research speed: FE Analytics reduces the time needed to load data and run screening. The team complete manager checks in half the time they were able to previously.



MPS visibility: The MPS Directory strengthens Isio's presence in the retail wealth market. Advisers can now locate the proposition and carry out due diligence easily.



AUM growth: Reporting tools allow Isio's team to support pitches with consistent and powerful charts. Synthetic historical data even enables comparison for newly launched models.



Competitor analysis: Filtering against key data points in FE Analytics' MPS Universe, Isio's team can benchmark against distinct peer groups.



Workflow clarity: The intuitive layout helps analysts find data and tools quickly. The team worked without training modules or external processing.



Unified process: The team are able to stay within FE Analytics for screening, comparisons and reporting. This removed the need to export data into spreadsheets.



**50% of
manager research
time saved**

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“I’m on FE Analytics every day and would 100% recommend it. It’s quick, easy to use and we find it more intuitive than the competition... I can find what I need quickly, run reports fast and use the platform every day without needing additional training.”

Daniel Nilsson
Portfolio Manager, Isio

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