

## CASE STUDY

# 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.



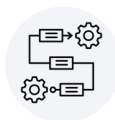
**MPS visibility:** The MPS Directory strengthens Isio's presence in the retail wealth market. Advisers can now locate the proposition and carry out due diligence easily.



**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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