

Providing custom research support to a USD6-billion long-short hedge fund to help expand its research coverage

BACKGROUND & CHALLENGE



A New York-based USD6-billion AUM hedge fund with a long-short equity strategy was looking for custom research support for its portfolio management team for the US and other developed market listed securities. Its research requirement included preparing financial model and valuation analyses, consensus models, investment tear sheets and company presentations, data dashboards, and screeners. It also sought support for creating meeting prep notes, investor presentations, and event summaries.

FULD & COMPANY'S SOLUTION



Fuld & Company created a research platform to support the client's portfolio management team with two analysts each supporting the consumer, industrials, financials, and technology sectors, respectively. The research team was attached to individual portfolio managers and participated in daily morning meetings and updates. Fuld & Company also provided fund analytics support, including updating the data for the creation/maintenance of quarterly fund fact sheets, along with fund marketing support.

OUTCOME FOR CLIENT



The flexible engagement model allowed the client to expand its research coverage to include emerging markets in the new fund strategy.