



Industry
Banking and Financial Services

Process
Credit Underwriting
Financial Research

Increasing Scope and Product Coverage of a Leading Asset Management Firm by Tenfold

Client Profile

A leading asset management firm that specializes in creating investment strategies and solutions for sophisticated, high-net-worth individuals and institutional investors

The Challenge

The client had three major challenges to surmount:

- Lack of customized products / templates to suit client's diverse requirements
- Data capture and standardization
- Knowledge transfer / business intelligence across teams

WNS was chosen after a rigorous selection process, and the client entrusted WNS with a mandate for:

- Underwriting credit deals in client proprietary application
- Monitoring investments through detailed financial models
- Providing a macroeconomic overview of Bank Loan, IG-Investment Grade, and HY-High Yield markets through weekly newsletters, reports and industry reviews among others

Key Features of the WNS Solution

- **Bank loan process underwriting support**
 - Update proprietary application with data from offering memorandum and term sheets
 - Creating and servicing financial models
 - Statement spreading
 - Coverage of 2500+ credits
- **Research process servicing support**
 - Build and update the servicing models with the latest financial results
 - Calculate key credit metrics to evaluate and monitor investment decisions
 - Coverage of approximately 600 credits
- **Structured credit process updates and monitor Collateralized Debt Obligations (CDO) / Collateralized Loan Obligations (CLO) deals where the client has interest / exposure**
 - This included cash flow, market value as well as synthetic deals
 - Coverage of approximately 650 names

Extending Your Enterprise

WNS extended the client's enterprise by helping increase scope and product coverage by tenfold, building a highly skilled and dedicated team of analysts, increasing revenue by developing new products and creating a sustainable offshore business model.

Benefits Delivered to the Client by WNS

- Increased scope and product coverage by approximately tenfold
- Built a client-dedicated team staffed with highly educated, skilled and committed analysts
- Created customized products / templates to suit the client's diverse requirements
- Designed and developed several new products for the client such as the weekly macroeconomic newsletter, which was distributed to its external clients, thus generating revenue
- Standardized approach for calculating key financial numbers such as EV, EBITDA, FCF and leverage, among others
- Created a sustainable offshore business model resulting in a Voice-of-the-Customer (VOC) score of 10 / 10

About WNS

WNS has a proven track record in driving significant enhancements for a wide range of clients in a Business Process Outsourcing (BPO) environment. WNS has delivered substantial improvements across the entire value chain using both WNS proprietary and customized, client-specific technology solutions (scripting, workflow management, real-time reporting, automated training, knowledge libraries and so on), as well as comprehensive process re-engineering and task enhancement initiatives (such as Six Sigma programs, training re-engineering, macros and operational tools, Pareto optimization). WNS is passionate about building a market-leading company valued by its clients, employees, business partners, investors and communities.

To learn how we can help extend your enterprise,
write to us at marketing@wns.com