



# Market Research Investment Due Diligence

**Client**

Regional Bank Investment  
Division in Charlotte, North  
Carolina

**Industry**

Bank Investment  
Management Trust Services

**Solution**

Market Intelligence  
Investment Research Platform

## Challenge

Regional bank investment division faced time-consuming manual research processes for investment selection, difficulty accessing comprehensive market data and investment research across multiple sources, inconsistent due diligence documentation for investment decisions, limited ability to track and analyze investment manager performance, and challenges maintaining current market intelligence for investment committee presentations.

## AI Consulting Approach

- **Research Process Analysis:** Investment consultants mapped existing research workflows, data sources, and due diligence procedures to identify enhancement opportunities using market intelligence and research management technologies.
- **Comprehensive Research Platform:** System integrating market data, research sources, and due diligence workflows to streamline investment analysis and decision-making processes.

## AI Solution

- **Market Intelligence Integration:** Platform aggregating market data, research reports, and economic analysis from multiple sources with centralized access and search capabilities
- **Investment Manager Analysis:** System tracking investment manager performance, style consistency, and risk characteristics with comprehensive due diligence documentation
- **Research Documentation System:** Platform maintaining standardized investment research templates and due diligence records with approval workflows and audit trails
- **Investment Committee Support:** System generating investment committee presentations and reports with current market analysis and investment recommendations



## Implementation (20 weeks total)

- Research Assessment (4 weeks)
- Platform Development (8 weeks)
- Data Integration (6 weeks)
- Testing Launch (2 weeks)

## Key Results

### Research Efficiency:

- 75% reduction in investment research preparation time, improved access to comprehensive market intelligence, enhanced due diligence documentation quality

### Decision Support:

- 85% improvement in investment committee presentation preparation, better investment manager evaluation capabilities, enhanced market analysis depth

### Business Impact:

- Substantial productivity gains for investment team, improved investment decision quality, 165% consulting ROI, strengthened investment process governance

### Technologies:

- Market data integration platforms
- research management systems
- due diligence documentation tools
- investment committee reporting
- performance analysis engines