

CASE STUDY - Custom Data Services – Name Maintenance

About the Client – Global Asset Management Firm

The Business Challenges

- Identify solution for the problem faced with the existing vendor application used for tracking and updating issuer name changes to security master database
- Suggest best process to validate the name changes manually on a daily basis until new application is in place
- Replace the existing in-house data management team, which supports the application in quality checks and cleanse the database

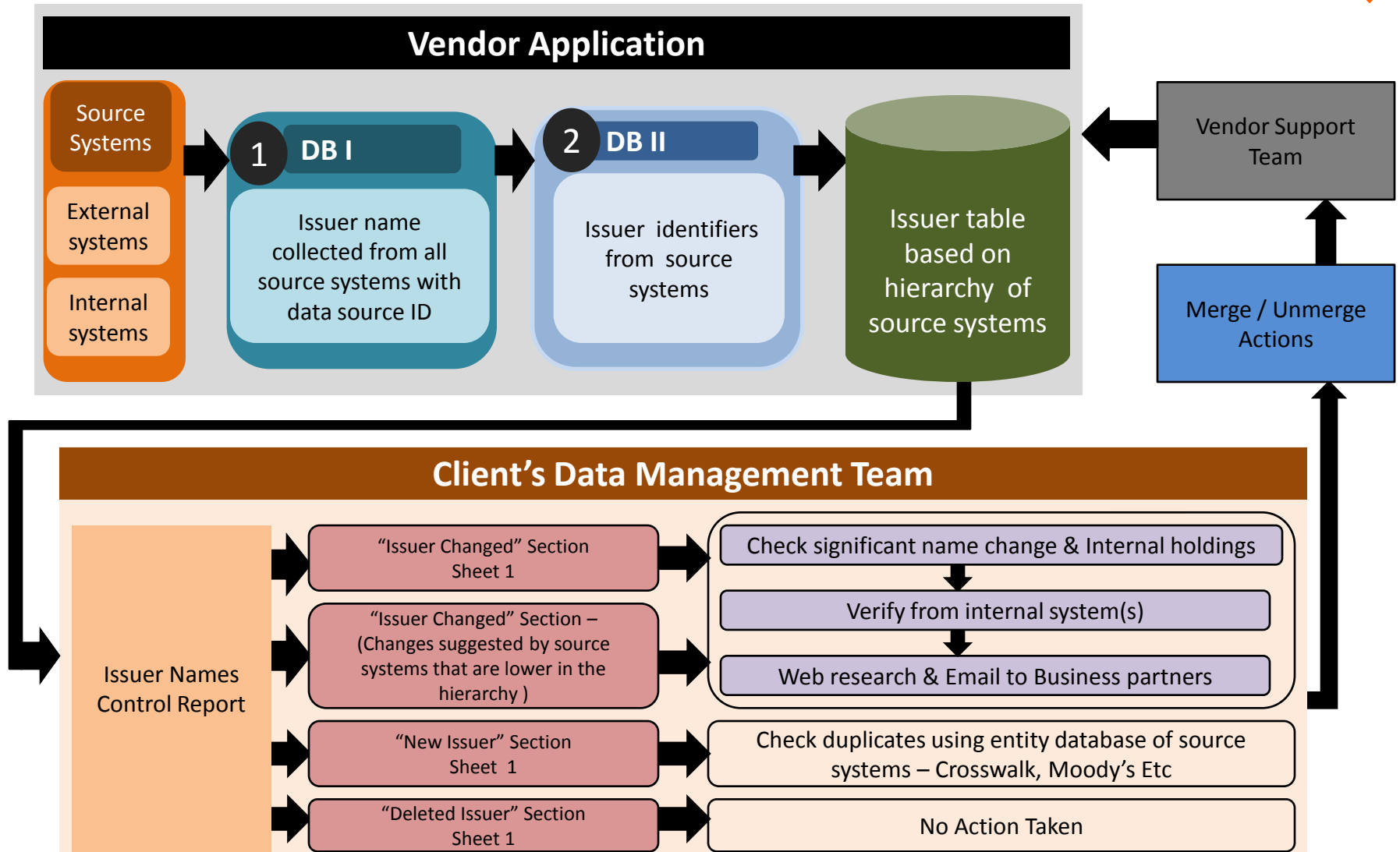
Results

- Complete analysis of the existing process and methodology followed by the client
- Identified alternatives to ease the process and the same is demonstrated to the client
- Pilot test on Mobius approach versus client's process and comparison report with flaws in the existing process is provided to the client
- Cleansed the database of 90,000 issuers along with linkage data for issuers belonging to the same group for analyzing group exposure

Benefits

- Supplemented client's in-house data management team with Mobius team ensuring best quality
- Research analysts working continuously on process improvement
- Developing tool to completely automate the process without manual intervention is under process

Client's Process – Issuer Name Maintenance



Mobius's Solution – Issuer Name Maintenance

