



Analytics to understand efficacy of research calls and evaluate economic value to retail clients acting on these calls



CHALLENGE

APPROACH

BENEFIT

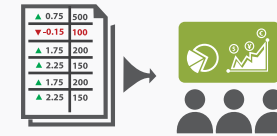
IMPACT

*P/E	32.03
*EPS	51.37
*P/C	27.33
*PAT	34.98

Defining appropriate metrics for evaluating efficiency of the research calls



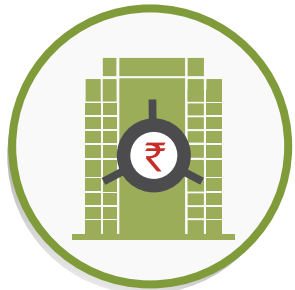
Creation of a comprehensive text analytics framework to cleanse, parse and extract information from unstructured data



Custom analytics to enable the customer extract data points from unstructured text

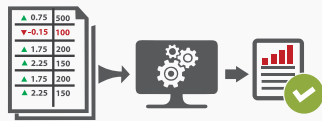


Ascertaining client turnover and brokerage driven by research calls published



CLIENT

A leading retail securities company with a pan-India presence.



Automating text parsing to identify relevant parts of speech and extract the key data points communicated



Use resultant information to derive the outcomes at a trade, business, client, research analyst and research call level



Ability to measure efficacy of Research Analysts and evaluate overall value of the Research function



Complex transformation of data form multiple sources to compute brokerage generated by the research calls and economic value accruing to clients who acted on the calls



Defined research efficacy framework using brokerage, client actioning of research calls and resultant outcome for the client



Analytics to identify utilisation of the research by end clients and the economic value derived from action taken on the research calls

▲ 0.75	500
▼ -0.15	100
▲ 1.75	200
▲ 2.25	150
▲ 1.75	200
▲ 2.25	150
▲ 1.75	200
▲ 2.25	150

Validating attributes from market data



Multi-dimensional data discovery for Performance Management



Better client segmentation based on their transaction profile



Profitable vs Unprofitable calls

“Our analysts had to deep dive into the data to ensure data cleansing was 100% accurate since accurate analysis of the outcomes was entirely dependent upon the comprehensiveness of our text cleansing logic. Once this was achieved the core analytics was easily handled in our Vital Analytix framework”

SANDEEP SANDHU
Chief Data Scientist, Pragmatix