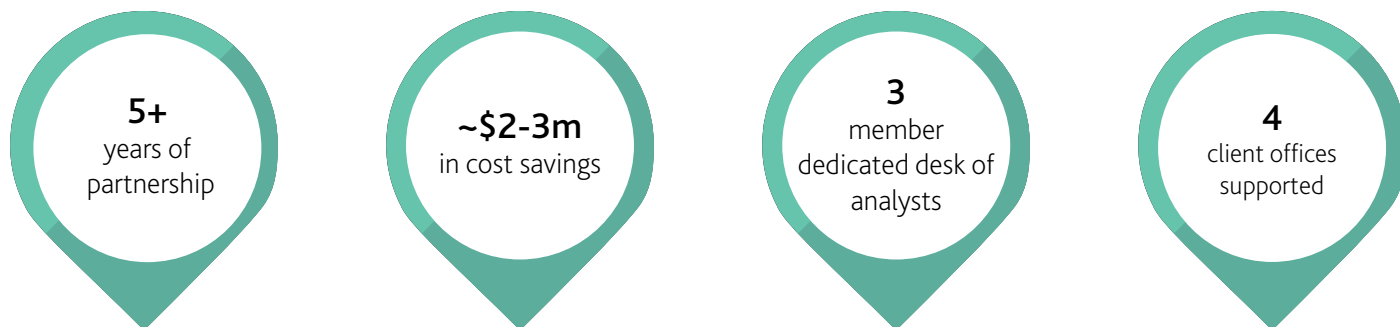


Impact Story – Private Equity (Co-investments Monitoring)

Global PE FoF firm headquartered in the US



Client requirement

- » A leading global FoF manager with around \$11bn of AuM across its 5 funds was looking to migrate co-investments data to an online platform to easily monitor and update data on a regular basis
- » The client extensively used its internal team to manage and monitor a large portfolio of co-investments
- » The monitoring exercise involved sourcing, aggregating, and scrubbing relevant reporting materials, thereby engaging its internal team extensively
- » Of the total, 80% of data was saved in silos, impeding real-time availability of data for analyses and reference
- » Moody's Analytics Knowledge Services partnered with the client in 2011 to migrate the entire data on the customized platform based on Salesforce and provided the following benefits:
 - Our experienced research team managed data migration across the new platform and provided customized dashboard reports as required by fund managers
 - We also provided efficient turnkey solutions for the client to reduce the high cost of storing and updating data on a regular basis

How we solved the problem?

- » Identified key client objectives and prepared a detailed roadmap with tangible milestones
- » A senior team member travelled to the client site for a week to analyze the data onshore and discuss key objectives with the client team
- » An offshore team uploaded the data (PDF documents, scanned documents, etc.) to Salesforce using best data migration practices
- » Implemented strong quality check processes to ensure that data quality was 100%. The project team is now mandated to manage data

What we did differently?

- » Aligned industry/product teams to provide value-added support with strong integration
- » Enabled the client to migrate to a new platform without investment in an onshore workforce
- » Facilitated the client with competitive advantage using a robust functionality platform to store and analyze data
- » Saved USD2-3mn in costs over the last 5 years

About Moody's Analytics Knowledge Services

We enable global financial organizations to innovate and transform in an ever-changing world. Our combination of subject matter experts and technology solutions drive operational efficiency, and seamless scaling. Providing customized solutions is in our DNA – solutions that have a tangible impact on our clients' top-line and bottom-line, enabling them to achieve more with less.

Our clients include leading financial institutions, asset managers, Fortune 100 corporations, mid-tier companies, and boutique investment banks. We support over 150 institutional clients through our team of 2,600+ employees and our global delivery centres, located in close proximity to our clients.