FE fundinfo

CASE STUDY

Enhancing client engagement and operational efficiency with an innovative data-based tool

How we empowered a top 25 investment company through creation of a pioneer portfolio look-through facility

Background

UK-based investment company abrdn, ranked in the top 25 of the global largest asset managers by AUM in 2023, was looking to create a customised facility enabling their clients and IFAs to have access to a comprehensive look-through into their portfolios. The firm was keen to build a one-stop shop for their clients to view their investments, performance over time, asset allocation, holdings and yield performances, along with several other data points and pieces of key information.

The objectives

This new MyFolio look-through tool aimed at improving and optimising communication and providing clients with immediate access to necessary information without making them wait for email responses, enhancing client relationships and operational efficiency in one.

- Transparency
- Digitalisation
- Comprehensive tool
- Data integrity & accuracy
- Operational efficiencies
- Enhanced relationships
- Improved communication

Achievements

Thanks to the MyFolio look-through tool, abrdn benefited from the following outcomes:

Operational efficiencies achieved by aggregating information into a single user journey, reducing the need for clients to ask multiple questions and ensuring all necessary information is in one place. This saved time and streamlined business as usual (BAU) activities.

Enhanced client relationships achieved through provision of transparency into their portfolios and ensuring clients are well-informed about their investments.

Data consistency achieved by leveraging off FE fundinfo's acclaimed data ingestion, validation and management capabilities, which is the foundation of any output we generate and essential to maintaining accurate and reliable information for our clients.

Automation of the previously manual process of data provision, ensuring data timeliness, accuracy and consistence, and enabling the asset manager to focus on their BAU.

Customisation by creating novel functionality such as facilitating access to information on end clients' investment growth from the point of their initial investment, regardless of when it was made and aligning with abrdn's client-first approach, focusing on client output and relationship growth.

Client-focused solution allowing clients to select specific risk-rated funds to compare and contrast along with specific time points on a chart, showing performance over their investment period and enabling them to see how their investments have grown since they started investing.

A tailored solution designed especially for abrdn, putting them ahead of competitors and fulfilling their clients' unique demands.

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Advisors use the **MyFolio tool** day in, day out

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FE fundinfo in collaboration with abrdn pioneered the creation of the MyFolio look-through tool, a novel concept in the market, marking the first time such a tool was developed for a multi-manager range of funds and a significant step in providing detailed investment insights to clients.

As your dedicated fund manufacturing and distribution partner, we navigate complexity to unlock your potential. We transform everyday challenges into opportunities for expansion with data-led solutions and established industry expertise.

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