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Insights Business Intelligence Meets Cross-Border Funds

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The trading of funds across borders has blossomed in recent years. Asset International is looking to revamp the sales and marketing of cross-border funds with a dose of business intelligence.

Important Details

The number and variation of cross-border funds grow by the day. Asset managers and investment houses crave visibility to the buying and selling of these funds, particularly across emerging market borders, to ensure that they are not missing out on opportunities their peers are capitalizing on. Furthermore, investment institutions possessing geographically dispersed teams require knowledge of local fund supply and demand trends to strategize their regional fund sales and marketing initiatives. The risk associated with sales and marketing planning grows with geographic reach, and the dollar committed becomes irreversible for funds that fail to sell. Database solutions have been used over the years to identify where funds have originated, by whom, and how they are priced.

Asset International just announced its business intelligence platform, Simfund Global Pro, which monitors all three factors concurrently and provides user-specific dashboards that enable investment firms to monitor cross-border funds possessing growing opportunities, as well as those that are losing interest from buyers. At the end of the day, the type of business intelligence offered by Simfund Global Pro enables users to set more accurate sales targets, spot trends that lead to more revenue opportunities, enable a better focus among sales and marketing teams, and drive more effective budgets and commission structures.

Implications

The use of business intelligence to identify business opportunities, reduce costs, and mitigate risks is nothing new. But its application across various verticals continues to spark a series of emerging benefits that set new standards for its respective industry — such is the case with Asset International's latest offering for financial services. Analyzing multiple sources of real-time information to drive a singular decision has not only become a key benefit, but also a new benchmark for the financial sector. Players like Morningstar, Thomson Reuters, Bloomberg, and McGraw Hill Financial continue to be at Asset International's heels, revealing a clear message about the driver of analytics in cross-

border funds: Investment houses are seeking unified solutions that support both investments and operational planning. There may be myriad financial tools that assist with investment decisions today, but not very many of them support sales and marketing initiatives that ultimately help investment firms reduce operational cost while increasing assets under management.

The promise of business intelligence in cross-border funds is clear. Yet, future developments in this realm present endless opportunities. Predictive analytics continue to cover new grounds in finance, as firms are not only looking to benchmark their performance against their peers today, but also to seek out areas of emerging opportunities (see Insights, November 21, 2013, Investment Discovery: Big Data Yields a New Frontier for Financial Markets) ahead of their competitors. These heavily disguised opportunities will become uncovered with the right technologies, yielding higher levels of return from markets that are not yet saturated. Examples of these include fund of funds, alternative funds, and other complex financial instruments that reveal promise. Finally, user adoption is the key to realizing this potential. Solutions providers like Asset International continue to innovate on the user experience (UX) front to ensure intuitive interface and minimal user learning curve — the two largest drivers for adoption. Moreover, the limited real estate offered by mobile device screens will present constant challenges for dashboard providers — those that are consistently striving to create effective role-specific user interfaces (UIs). Regardless, the application of such technologies in the financial markets has already served as a sounding bell for new disruptors in the space — a welcoming sign for today's investors.

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