
Scaling Investment Research and Analysis Through Technology

A Global Financial Services Firm

Features

- ▶ Confirming a valid data change before downloading the entire data set
- ▶ Identify all the companies affected due to a data change
- ▶ Apply quality assurance check to validate the correctness of data change.
- ▶ Associate the correct ticker symbol, exchange, GICS code, Share price, forecast data based on various characteristics for a company
- ▶ Quality assurance checks for:
 - Correct currency
 - Negative or zero revenue check
 - Correct financial / reporting periods
 - Abnormal revenue shifts
 - Actual data
 - Forecast period match
 - Forecast year to year growth check

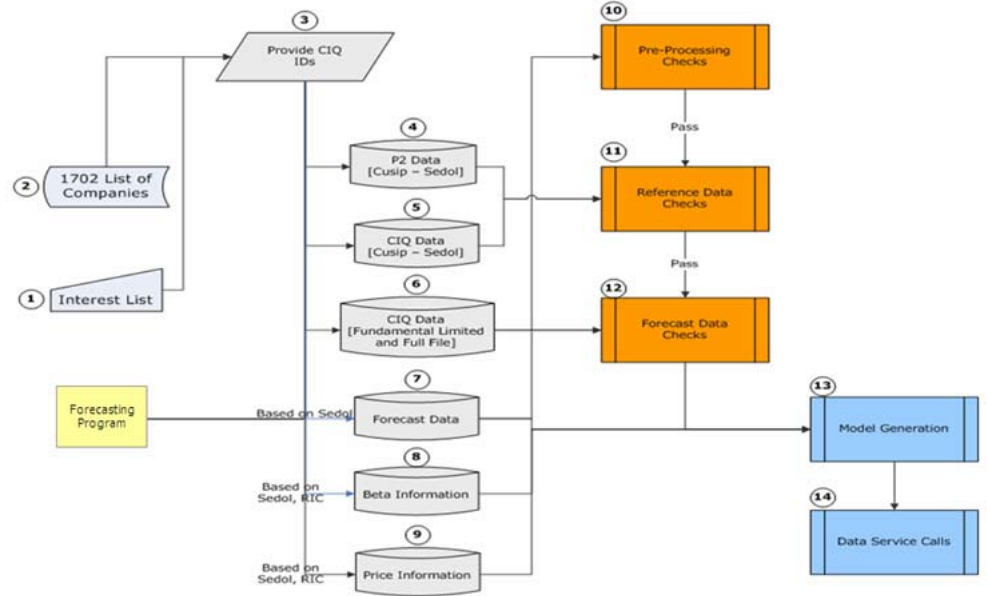
Benefits

- ▶ 90% of the manual processes were eliminated
- ▶ Provided a provision to implement corporate action processes rapidly without changing the current business processes

- ▶ Close to 95% of the QA checks were implemented using Rage, thereby eliminating omissions and errors

Model Generation Process has too many handshakes which increases elapsed time, required manual intervention and was error prone.

RAGE provided a highly flexible business process by streamlining the data sourcing, data validation and Q/A tasks



Rage implemented business processes including specific quality assurance checks throughout the flow to smoothen the process

