

Case study

Drove a US asset manager's fund launch

About the client



A US-based specialist equity fund manager sought differentiated investment ideas in under-researched, high-growth markets for their EM portfolio.

Client challenges



Investment selection and research

- Limited analyst coverage delayed due diligence
- Data scarcity made opportunity identification difficult
- Lack of local insights resulted in heavy reliance on broker reports
- Inconsistent reporting standards complicated financial analysis
- Lack of proper peer benchmarks hindered relative valuation comparisons
- Weak competitive intelligence limited conviction in niche sectors

Our solution



The Crisil analyst independently identified and researched an attractive investment opportunity

- Spotted the sectoral shift toward organized gold loan lending
- Identified undervalued gold loan firms in India using quant screeners
- Leveraged local insights to validate the initial investment thesis
- Built a comprehensive financial model, assessed share price correlation with domestic gold prices
- Analyzed competitive dynamics, highlighting gold loan's safety compared with other retail lending products
- Presented the investment thesis and findings to the fund's investment committee along with the portfolio manager, who then initiated a significant position in the security

Impact and results



~90%

One-year return on the recommended equity investment

30%

Shorter idea-to-investment cycle, enabling faster portfolio deployment in high-growth markets

Top-10

The stock became a key position in the portfolio

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About Crisil

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