

CASE STUDY

An Investment Manager Discovers an Efficient Way to Identify Valuable Data

THE CLIENT:

A Europe-based
quantitative investment
firm

USERS:

The research team

Data driven decision-making is imperative for companies, enabling them to derive new business value, improve operational efficiency, increase competitive advantage, and respond to competitive threats.¹ There are multiple challenges associated with the successful utilization of data, however, including the time needed to identify the most relevant datasets for an organization given the enormous increase in volume and variety of data sources.

The research team at a quantitative investment firm in Europe wanted to continually push the envelope and generate new ideas for the firm's portfolio managers. Team members knew they needed to access and analyze a wide variety of information for this to happen – an onerous task for a small shop. They wanted to find a faster and more efficient way to determine what datasets could yield cutting-edge insights.

¹“Delivering Value from Data: Accelerating the path from data to decision”, S&P Global Market Intelligence 451 Research, as on: www.spglobal.com/marketintelligence/en/documents/sp-global-delivering-value-from-data.pdf.



Pain Points

Members of the research team wanted to assess a number of new datasets to understand how they might be able to further their analysis. This included more extensive company financial information, earnings estimates from analysts and brokers, and details on events, such as interim management statement calls and operating results announcements. They realized that analyzing all this information would be a lengthy process, and were looking for an innovative solution that would give them:

- **Ready access to all the data needed** from a singular trusted provider.
- **The ability to use a web-based notebook environment** for exploratory data analysis.
- **Flexibility** to use multiple programming languages.
- **Strong visualization capabilities** to better understand trends, outliers, and patterns.

The team knew that S&P Global Market Intelligence (“Market Intelligence”) was well known for its extensive array of data and powerful analytical tools and contacted the firm to see what help could be provided.

The mantra has evolved from ‘more data’ to ‘faster insight’ as companies look to generate value from all the information they use.¹ But evaluating data takes time, and this small research team needed a more efficient way to identify data that can create a competitive edge.



The Solution

The **S&P Global Marketplace Workbench** is a cutting-edge technology that enables users to test, explore, and experiment with datasets from S&P Global and curated third-party providers in a scalable and secure cloud-based environment, with no installation required. Using the web-based notebook environment, users can create and share documents that contain live code, equations, visualizations, and explanatory text. This would enable the research team to:



Quickly perform exploratory data analysis

Workbench provides access to 50+ S&P Global datasets to perform exploratory data analysis or build models.²



Access pre-built or customized notebooks

Users can easily analyze and review 65+ pre-built notebooks by S&P Global data experts and data scientists, or build their own to better understand and see first-hand the value of various datasets.



Use multiple languages

Workbench facilitates multi-language support in a single notebook inclusive of R, Python, SQL, and Scala, and supports interoperability between programming code that is executed in different languages.



Create extensive visualizations

With Workbench, users can create tables, charts, dashboards, animations and more to see correlations and capture the power of the data.

²Numbers as of November 2021.



**Benefit from
automatic
versioning**

Code, text, and data is automatically version controlled, keeping track of changes that have been made and ensuring that team members are all using the latest information.



**Easily work
collaboratively**

The environment enables teams to collaborate across notebooks in their company's own secure and scalable workspace. Users can share notebooks and work with colleagues through real-time co-authoring and commenting to enable streamlined teamwork while maintaining control.



Key Benefits

Members of the research team used the S&P Global Marketplace Workbench to evaluate S&P Global's financials, estimates, and events datasets. Leveraging pre-built notebooks, they were able to quickly dig deep into these datasets to see how they could achieve their goal of continually introducing new ideas to the firm's portfolio managers. Marketplace Workbench helped them:

- **Immediately access information in the cloud**, eliminating the need to manage an on-premise database.
- **Easily perform their due diligence** to better understand the relevancy of the information before proceeding with a subscription.
- **See how data visualizations could be used** to uncover insights and create clear, yet powerful, presentations for the portfolio managers.

[Click here to learn more about the S&P Global Marketplace Workbench.](#)

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