



## \$50B AUM Wealth Management Firm Case Study

### Obligor Intelligence is...

Getting instant clarity into muni credit situations.

For a major wealth management company, guiding over \$50 billion assets under management, success is based on delivering investment excellence to their 2,200 clients. Through its work with Bitvore's Obligor Intelligence, the company is able to monitor holdings with portfolio surveillance of material changes. Bitvore delivered both the ability for the team to know the important changes before the competitors, while also increasing their holdings universe.

The Problem:

With over 2,200 clients and 8,000+ individual holdings, the company's forward looking leadership team wanted a way of getting clear, concise and timely information for their analyst team on what might impact the municipal bonds in their client portfolios. Given that regulatory disclosures are issued only twice per year, the data available was outdated and useless as a competitive advantage. Additionally, real-time manual searches and automated clipping services were both time-consuming and ineffective, providing only a limited view on local news and related legislation. The company wanted to take a more proactive approach in getting the right material intelligence to make better and more impactful decisions for their client's holdings.

"We are so excited using Bitvore's Obligor Intelligence. It's an **amazing tool** in our arsenal."



The company needed a better way. The company needed Bitvore's Obligor Intelligence.

#### The Solution:

The company experienced the power of Bitvore and the positive results were immediate. With no learning curve needed, the team quickly discovered that it was not a typical generic consumer search tool.

Instead of sifting and searching through alerts and hundreds and hundreds of irrelevant articles and links, the company received personalized material intelligence to their area of interest. The concise, custom email briefs provided to analysts and portfolio managers were specific to the 8,000 bonds in their portfolio and sectors of interest.

The company received a 360-degree view of an obligor and issuer to help minimize risk and increase their profits. With this powerful platform, the company saved several hours each week enabling them to redirect their energies into expanding their client holdings.

Additionally, they were able to spend time on precision searches (Bitvore's Lookup), market trends and local news, such as sentiments around upcoming general elections. Bitvore has seamlessly become part of the company's morning routine, with daily morning checks to ensure that the desk gets the right news at the right time before their competitors for a very real competitive advantage.

"Any company that has a significant number of holdings would absolutely benefit.

**It's about being proactive.**

"Bitvore's Obligor Intelligence is enabling us to **expand our holdings universe.**"



## About Bitvore Corp.

Bitvore gives power to business leaders worldwide with highly focused, relevant and immediate material intelligence within the context of your business needs and decisions. Bitvore's Intelligence platform – built by business leaders FOR business leaders – delivers a Material Information Advantage that elevates and improves our customers' bottom line. Bitvore's patented AI technology masters the exponentially growing volume of information, far beyond the drudgery of time consuming searches and archaic manual reporting. Bitvore's customers include Breckinridge, Fidelity, Eagle, Mackay-Shields, Baird, KBRA and many others. Learn more at <http://bitvore.com>.

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