



Charles Fish Investments Case Study

Obligor Intelligence is...

...A Competitive Advantage.

For Charles Fish Investments, the fundamental principle on which CFI was founded is that the best interest of the client comes first. Founded in 1984, the company's mission is clear: devote the resources, intensity and vigilance necessary to insure all clients receive consistent and superior results.

Building and maintaining efficient portfolios is their strength, but as a private, employee-owned company, CFI's success and growth is based on their ability to outperform their competition and design portfolios that are customized, tailored and unique. And working with Bitvore's Obligor Intelligence, the company is able to do just that.

"Everyone in our business needs this. It's not about surviving in a competitive environment – it's about the need for perpetual vigilance."



The Problem:

How does a small investment management firm – with modest resources get market mindshare and visibility in order to compete with the "big guns" to gain business? How does a small investment firm – with fewer "feet on the street" grow the business efficiently and cost effectively? How does a small investment firm get and stay ahead of over 1020 obligors?



In the world of wealth management, it becomes about differentiation. It becomes about providing superior results based on experience and deep knowledge. It becomes about providing a level of guidance that few can match.

EMMA disclosure filings, though publicly available, are often outdated and typically provide little in the way of a competitive advantage. Ratings agencies only cover a fraction of the issuers, trail the news by weeks or months and are widely available to everyone at the same time.

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

The Solution

Bitvore's Obligor Intelligence was customized to automate the monitoring of CFI's holdings, and personalized to track changes in their specific sectors, regions and topics. Almost immediately, the daily email alerts provided a deep level of local intelligence that previously was nearly impossible to unearth. The quantifiable benefits were immediate and impressive. Bitvore's Obligor Intelligence uncovered several local news bytes (think embezzlement, lawsuits and budget deficits) that would have gone unnoticed without Bitvore. CFI was able to act in a timely fashion while most of the municipal securities industry remained in the dark.

With tailored and focused information delivered each morning, the CFI team saves several hours a week simply because manual, time consuming searches are no longer necessary. The bonus: CFI was able to free up an additional credit analyst and redirect their energies into improving their clients' performance.

"Not a week goes by that we don't get great information that's **impactful** to our business."



"It **just takes one time** to miss something."





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, Bessemer Trust, Mackay-Shields, Baird and many others. Learn more at <http://bitvore.com>.

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