

CASE STUDY

London asset manager maximises findability with strategic database presence

Trinity Street uses eVestment to identify opportunities and differentiate themselves

 **TRINITY STREET**
Asset Management

\$4.2B

FIRM AUM

2002

YEAR FOUNDED

64

MINORITY/FEMALE OWNED

Planning for success

For smaller asset managers, driving asset growth with limited resources is a challenge. Adam Gerentine, Managing Director at Trinity Street Asset Management, realised that in order to maximise asset growth, he needed to deploy a structured, focused approach. Turning to eVestment's intelligence platform, Gerentine set about understanding where demand for their products is coming from, allowing them to strategically deploy resources to best set them up for success: "We have a limited marketing team of three people who are out on the road talking to people, with some support in the office. eVestment's tools allow them to understand the demand per asset class, and therefore what areas potentially require more focus."

Maximising findability with a strategic database presence

With a clear view on demand, Gerentine knew that building a strong database presence was the next step in raising assets from the consultants and institutional investors that rely on eVestment as the backbone of their manager research and selection process. Trinity Street leveraged eVestment's intelligence platform to optimise their findability: "We use eVestment's platform tools to understand which consultant and investor database screens we are passing, which

"We use eVestment's platform tools to understand which consultant and investor database screens we are passing, which are we failing, and why."

are we failing, and why." Without eVestment, Trinity Street "were failing screens simply because there was information we had not provided." By utilising the eVestment platform and making some simple adjustments, Trinity Street have found they have significantly reduced the proportion screens failed due to missing data.

Creating new opportunities and positioning effectively

In addition to knowing how to better allocate resources and pass more consultant and investor screens, Trinity Street used the platform to identify opportunities and differentiate themselves: "We can use eVestment to try and get a narrower focus as to who our peer group is, then compare ourselves based on characteristics and the resulting number of screens. That allows us to identify why we're being selected, and another firm isn't, or vice versa."

Trinity Street put this into practice by proactively creating potential revenue opportunities with prospective clients. After identifying the managers in an investor's roster, Trinity Street reviewed these managers in the eVestment platform to understand their characteristics to then create

a visualisation of portfolio which included their strategy.

"We were then able to share with them that the correlations of their managers were pretty low, and that we believed we would be very additive to their diversified portfolio. This has led to more significant conversations and a more expedited process for us."

Optimising the team for success

With a smaller marketing resource but expansive goals, Trinity Street needed a degree of service and implementation to maximise the value of their platform access: "The team has been incredibly helpful to us. With them we were able to create quarterly reporting templates to understand a lot of information that we can pass along to our management to show the impact that our marketing is having."

Gerentine continued, "We are also able to put together some reports to show where we stand in our universe of clicks as well as looking at where assets are flowing both in and outside of our asset class. It's helpful to inform management with some of that information."