

## CASE STUDY

## Hedge fund utilizes eVestment to identify, win and retain new opportunities

Quant hedge fund in NYC prospects and identifies opportunities sooner than the competition

**Quest  
Partners** LLC**\$1.5B**

FIRM AUM

**2001**

YEAR FOUNDED

**4**

NUMBER OF FUNDS

### Getting ahead with the right intelligence platform

Winning opportunities requires precision targeting. Scott Valentine, Head of Investor Relations at Quest Partners, said his firm needed a platform that could give them the "ability to anticipate mandates before they come out and to see who is, at a given point in time, evaluating our type of manager or quantitative strategies."

Without such a centralized intelligence platform, the firm resorted to "scouring public plans' websites, receiving information from industry peers and occasionally hearing from someone who would recommend us for a mandate. We also had a tough time sourcing competitor data."

eVestment offered them Market Lens, a library of more than 50,000 plan documents that gives users visibility into where investors are adjusting target allocations for the future, searches under review that have not been announced, and more.

"Market Lens has made all that information centralized and easily extractable. This has given us easy access to information on our competitors and the ability to identify areas in which we can improve."

### Redefining the firm's marketing strategy

Quest found that Market Lens "gives us real support on the marketing front. When client prospecting, I can see who in the industry is looking for us. I can also now better understand our competitors, so when I go into meetings with prospects, I am able to present ourselves in the most favorable light."

And when it came to gaining insight into the larger playing field, Quest found that eVestment's platform provided the context they needed: "It's been a huge benefit to be able to analyze our peers by seeing their pitch decks and the information they're presenting."

"It is now easy for us to understand

our clients and potential clients, better understand our competitors, and to be in front of anybody who's looking for a mandate that fits the profile of any or all of our funds."

### Staying on top of market trends

Since subscribing to Market Lens, Quest Partners has been able to get ahead of mandates and stay on top of market trends. "We are able to receive numerous quality alerts that allowed us to put ourselves in contact with the right people at the relevant plans early on in the process."

"The biggest benefits have come from the ability to read through the unpublished documents which require doing a FOIA. Those documents let us see what they're thinking on the market and get a feel for where they view their portfolio moving forward."

"We evaluated other offerings but at the end of the day, there wasn't a comprehensive platform that was providing the information we needed. We have a high ask and rarely act on a service provider unless they meet our rigorous requirements."

"We had been waiting for a product to come up to that level – Market Lens took us there. It is important for us to have not only the comprehensiveness, but to feel we have an equivalent offering relative to what we're paying."

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