Blue Lion to bring artificial intelligence to support alternative fund manager research and selection

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LONDON, 25 October 2016: Blue Lion Research is bringing the powerful insights generated by artificial intelligence to the world of fund manager research and selection. The City of London Fintech company will be working with both investors and fund managers to help them generate a more insightful picture of the complex universe of alternative managers.

Blue Lion Research will be providing a far more comprehensive picture than that traditionally generated by analysis of fund performance, assessing operational criteria, clauses and features of fund legal documents, deep comparison with peers and assessing how fund managers are responding to market conditions.

In addition, Blue Lion will be harnessing machine learning technology to support portfolio construction and allocations to alternative funds. This can deliver brand new insights into the critical dynamics that affect alternative fund portfolios, including alerts that may support rebalancing of funds in a portfolio, guide appropriate allocation ticket size or indicate possible redemptions.

“Data on the alternative investment universe and funds is often complex and fragmented, including both subjective and objective information from both qualitative and quantitative data, harnessing that data in an effective way to provide real commercial intelligence is difficult for even the most advanced investors, or managers” says Grant Fuller, co-founder of Blue Lion Research. “Advances in artificial intelligence and machine learning in recent years means it is now possible to assess the investment universe, and individual funds within it, in new and insightful ways, producing metrics and analysis reports for investors and managers that were simply not possible previously.”

Blue Lion Research will also be working with fund managers, enabling them to directly benefit from AI-driven analysis of their funds, helping to improve the understanding of their fund, its peers and competitors and crucially its investors. “Knowing, and being able to evidence, what differentiates a fund is a powerful insight for the manager and compelling intelligence for investors”, says Fuller. “Similarly, our AI technology enables us to help managers assess potential investor appetite and subsequent likely allocation amounts their strategy and their fund might expect.”.

Barry O’Leary, Director of Operations for Blue Lion Research, says: “We have found that the reports Blue Lion can generate for allocators can be immensely helpful in providing an additional layer of quantitative and qualitative analysis of funds. This is not a static solution: we continue to work with our clients, providing them with updated analysis and alerts as the characteristics of the alternatives market change on a month by month basis.”

The principals behind Blue Lion Research have long track records in the field of technology-driven research and its application within asset management.

Grant Fuller has long been a pioneer in the application of technology within fund analytics and alternative funds research, including helping to start and develop Bloomberg’s Alternative Investment Management (AIM) trading and analytics platform, and helping to develop the European asset management technologies business at RiskMetrics.

Barry O’Leary has extensive expertise in the fields of fund management, custody and investor services, and has worked for more than 20 years in some of the largest financial institutions, including Citigroup and HSBC. In particular, he has focused on the development of electronic trading, algorithmic trading platforms and the use of artificial intelligence in trading solutions. He has worked alongside numerous successful hedge funds, helping them to achieve their operational and investment objectives.

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About Blue Lion

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Blue Lion works with investors and fund managers in the alternative funds sector to provide a unique and unprecedented view of the market they operate in. Blue Lion Research draws on the latest AI-driven technology to analyse and identify the hidden fundamentals of a fund, its essential DNA. Designed to provide a comprehensive view of a fund, Blue Lion's AI solutions combine detailed analysis of fund documentation, with discovery of patterns and relationships between funds, their performance, peers and markets. Blue Lion Research can be used to support investor due diligence, fund selection and portfolio construction, or assist managers with evidencing and articulating their strategy and key differentiators. Blue Lion's AI provides uniquely powerful insights for improving engagement, increasing understanding and transparency.

More information about Blue Lion Research can be found at the company's website:
www.bluelionresearch.com

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