Capital Markets Sell Side Survey - Client Servicing and Alt Data top the list

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London, December 08 2020: Singletrack, the leading provider of capital markets CRM and research management solutions, today announced the results of its Sell Side Survey, covering strategic priorities and technology trends.

In an era where investment banks and independent research firms are seeing the price that fund managers are willing to pay for their research fall, the sell side is focusing on what it can do to retain a share of the shrinking wallet. The top areas identified in the survey are:

- data driven client servicing (a priority for 70% of respondents), in particular improved personalisation of service offerings, tying service levels to to commercial value and using insights to identify new opportunities and leads as well as cancellation threats

- alternative data (a priority for 55% of those surveyed) including integration of alt data across research production and developing new product offerings to address investment manager demand

On-going challenges were identified as

- understanding the big picture by bring together key data from the traditionally siloed functions of sales, trading, research and corporate

- capturing and managing interactions: for many, an ongoing administrative burden nearly three years after the inception of MiFID II

- the threat of diluting intellectual property in distributing research to clients via aggregators

Stuart Berwick, CEO, comments “When you consider the primary strategic focuses for sell side firms - improved client servicing and integrating alternative data into their research offering - developing a clear technology strategy and selecting the right partner is key. A decade of experience delivering successful implementations - entirely remotely during this year’s pandemic - and the resulting methodology which avoids implementation fatigue are just two of the areas where Singletrack excels and why we’re trusted by sell-side firms globally.”

ENDS

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About Singletrack

Singletrack’s cutting-edge CRM and research management technology enable capital markets firms to prosper in the unbundled marketplace. With offices in London and New York, and over 50 clients around the globe, Singletrack is leading the way in capital markets CRM and research management.

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