

Client Case Study

Scandinavian Multinational Bank

Our client is a multinational bank and financial services corporation based in the Nordic region, advising large financial institutional clients to raise capital. Weekly reports are run on bond funds with unique insight used to enrich customer communications. Our client has requested to remain anonymous; therefore, throughout this document we will refer to them as 'FSP' (Financial Services Provider).

How we help

FSP has been a client of EPFR since 2019, with direct access to EPFR data along with a subscription to EPFR's weekly reports. Our EPFR data and insight enables sell-side professionals at FSP to ascertain where money is moving, and obtain a unique view of the bond flows driving northern European markets.

Our main sponsor joined FSP within the first year of our partnership, dedicating each day to analyzing EPFR data and generating internal weekly flow reports for the DCM Origination team. "Every week, when there's a new report coming out, I look at Western Europe Euro-denominated bond funds to see where the inflows are coming in," said our main sponsor. "I classify the data as investment grade, high yield, and/or quality. Team members analyze the weekly flow reports before speaking to existing and potential issuers on market conditions, providing insight and advice on the best timing to go to the market, or issue a bond."

EPFR's easy-to-use data filters help our main sponsor in day-to-day reporting, he commented: "The ESG and duration [filters] are very useful! Basically, the filters tell us where investors would rather invest right now, and provide us with insight into investor sentiment in the market. It's really helpful for us to see where the money is actually going and then we can translate that to our issuing clients."

EPFR allows clients to monitor fund flows and quantify the collective actions of investors. EPFR Fund Flows and Allocations data offers signals of changing investor sentiment and behavior. Our sponsor said: "The most helpful is probably knowing generally if there's more money invested in the bond market and if investors are more willing to deploy cash and, also, in terms of sentiment." EPFR guides understanding of the availability of liquidity from sources of capital and signals shifts in momentum.

Considering EPFR as a data provider

Through the in-depth market knowledge provided by EPFR data and weekly reports, investors and money managers can monitor fund flows and further understand the shifting macroeconomic environment. Fund flows provide insights into underlying investor demand for funds, by geographic region, global sector, and asset class, and offers signals of changing investor sentiment and behavior.

Our main sponsor works closely with a dedicated EPFR account manager to explore and improve methods to obtain new data insights. He highly recommends EPFR data to other finance professionals wanting to monitor the overview of inflows and outflows into credit funds: "EPFR is a 'must have' if you are going to be working in Debt Capital Markets. I'm not aware of any other platform that provides the same granularity and coverage!"

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Main sponsor, Financial Services Provider



ABOUT EPFR

EPFR is 'the intelligence behind intelligent decisions'. Our fund flows and asset allocation data track over 150,000 traditional and alternative fund shares classes with more than \$46 trillion in total assets, delivering a complete picture of institutional and retail investor flows and fund manager allocations driving global markets.

EPFR's market-moving data services include equity and fixed income fund flows on a daily, weekly and monthly basis and monthly fund allocations by country, sector and industry, providing financial institutions around the world with an unparalleled understanding of where money is moving.

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