

Client Case Study

Jefferies Hong Kong LTD

Global investment banking firm Jefferies has served companies and investors for over 50 years. The company provides clients with capital markets and financial advisory services, institutional brokerage and securities research, as well as wealth management. Besides, the firm also provides a full range of investment banking services, and research and execution services in equity, fixed income and foreign exchange markets.

How we help

Jefferies Hong Kong Limited, a client of EPFR, has subscribed to EPFR Fund Flows and Allocations data and insight since 2011.

Kenneth Chan, SVP Global Quantitative Strategist at Jefferies HK LTD., and his team use a range of sources to build out their reports, and EPFR's Fund Flows and Allocation data is a key component.

Mr. Chan onboarded EPFR when he joined the business, as to him: "The data coverage was good – in particular, the country flow and allocation datasets are very useful to me and my team at Jefferies. Since working with EPFR, we have also noticed the Bond and Money Market insights have improved and we are able to derive value from those, too."

In Mr. Chan's role as a quantitative strategist, utilizing a range of reliable data points to create a clear picture of what is happening in the market is central to the reports compiled and issued by his team. He commented: "We create reports each week that equip both internal stakeholders and clients with the insights they need on market positioning to make informed decisions."

Considering EPFR as a data provider

EPFR's data sparks Alpha generation as a sentiment indicator in both bottom-up stock picking and top-down asset allocation investment strategies across asset classes. EPFR's data and insight helps portfolio managers, asset allocators, strategists and research teams understand where money is moving, how fund managers are investing that money, and what impact those shifts are having on geographies, sectors, industries and securities.

Mr. Chan would refer EPFR to others who are considering a fund flow and allocations data provider, commenting: "EPFR is a data set that is useful as a comparison across markets, regions and asset classes. The data will tell you what is happening from one region to another, meaning that you can better understand investor sentiment."

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Kenneth Chan, SVP Global Quantitative Strategist, Jefferies Hong Kong Limited



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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