

From: [Jennifer@CompanyA.com](mailto:Jennifer@CompanyA.com)  
Subject: Re: Your Bloomberg Consultation

Hi there! Thank you so much for your questions. I've tried my best to answer them below – happy to provide some more information when we speak.

Looking forward to hearing more about which products could help us the most.

Best,  
Jennifer

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**Q: I see that you provided an overview of the company's equity investments. What other assets does your firm invest in?**

*We also invest in real estate, derivatives, and alternatives.*

**Q: I see you have two equity analysts. Do you have analysts supporting other asset classes?**

*Yes, each asset class we invest in has two analysts.*

**Q: What assets do you not invest in that you would like to invest in?**

*We are interested in credit and ESG, but we do not currently have the research capacity for this.*

**Q: It looks as if your equity investment team is doing a great job at beating the market (24% returns vs. 10% returns). Can you provide any insight into how they approach researching investments?**

*We have an equity analyst team of two people. They are responsible for generating ideas and helping to inform the decisions of the firm's investment team and advisors.*

**Q: Company A's Core Equities Fund's performance is really impressive (64% vs. 10% S&P 500). Why aren't more clients invested in this asset?**

*Good question! This is a relatively new offering, and we have just started marketing it to all of our clients. Managing this takes up about 25% of the equity analysts' time, and the returns are great – we need a way to better communicate this offering to our clients.*

**Q: How does Company A determine what equities to invest in?**

*It depends – we look for great returns and we model our portfolios to adjust to the client's risk appetite. There is no one-size-fits-all portfolio for our clients. Overall, they analyze company, industry, and macro data to make their decisions. It is a very time-consuming process.*

**Q: What tools does Company A use to make investments?**

*We have Bloomberg Terminal and we also use Jenga45 and Moxy for this.*

**Q: Your average investment size for equities varies quite a bit. How does Company A optimize the investment portfolio?**

*We optimize investments based on a spreadsheet that the research team manages. I know it isn't very sophisticated, but they are hesitant to learn new tools. Would love to get them upgraded.*

**Q: Why are only 30% of clients invested in equities?**

*We invest client assets on a client-by-client basis, and some have no interest in individual equities.*

**Q: What are your biggest pain points in managing client relationships?**

*Our biggest pain point is trying to make our advisors more efficient. We want them to be able to manage more clients, and we want them to spend as much time interacting with clients as possible.*

**Q: I see that for some of the investments, investors haven't received an update in some time. Can you tell me more about how this process works?**

*This process is managed by the advisors and is supported by the research team. The coordination is done via an Excel spreadsheet. Like I said, they aren't very sophisticated with these processes. This has become a priority for our CEO, so if we can find some solutions for this, that would be great.*

**Q: How do you execute trades on behalf of clients?**

*We use Milton's Trades for this. We are very happy with their services.*

**Q: What would make communicating with clients easier?**

*I think we need to automate this process in some way.*

**Q: What are the firm's biggest pain points?**

*Our research technology. Getting our equities research team up to speed with the latest technology is a must. We need to be able to offer more investments and improve how we communicate these investments. Also, our advisors need to be more efficient.*

**Q: Who makes product decisions at the firm?**

*I get input from the teams that will be using the software before I make a decision on what we should use.*

**Q: Why isn't your current software working for you?**

*We have a lot of employees at the company who have been here for over 20 years, and while they have been doing a great job at making investments and servicing clients, we need to better equip ourselves with technology to become more efficient. Some of the software we use is outdated, or it simply isn't used at all. We do rely on Bloomberg Terminal, and I'm hoping that adding additional Bloomberg tools will help with technology adoption across the firm.*

**Q: Are you currently satisfied with your Bloomberg Terminal subscription?**

*Yes, absolutely! The team raves about it.*