

SUCCESS STORIES - SUMMARY


Project Name	Client	Brief Description	Key Analyses
Portfolio Analytics Services	Private equity firm	Analysed the portfolio companies' financials and internal data to identify revenue and cost savings opportunities, conducted supply chain analyses, analysed industry database for Retail sector, market survey data from portfolio company, etc., which helped Portfolio companies realize higher revenues .	Competitor Pricing analysis, Supply Chain analyses, analysed industry database for Retail sector, analysed market survey data from portfolio company

CASE STUDY – PORTFOLIO ANALYTICS SERVICES


ABOUT THE CLIENT

Client is a leading private equity firm that takes majority ownership in small and mid-cap companies in the consumer segment in North America


SITUATION

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- Client has an excellent track record of investments over the past 25 years and has an experienced team of investment, strategic and operational professionals
 - Merilytics partnered with the client to provide high quality analytical services for its portfolio companies

VALUE ADDITION

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- Analyze the portfolio companies' financials and internal data to identify revenue and cost savings opportunities
 - Conduct a competitor pricing analysis and identify optimal prices for the portfolio company's products to maximize the profitability
 - Conduct supply chain analyses to identify issues with portfolio company's demand planning, inventory management and logistics
 - Analyze industry database for Retail sector to identify competitive product characteristics and further acquisition opportunities
 - Analyze market survey data from portfolio company and draw insights on product performance, brand attributes and customer behaviors using factor, derived importance and cluster analysis methodologies

IMPACT

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- Our in-depth analysis with short turnaround times allowed the client to enhance the value of its portfolio companies
 - Portfolio companies realized higher revenues (through pricing changes and better demand planning) and higher EBITDA (through lower inventory and shipment costs)
 - Increased efficiency and effectiveness of portfolio operating team