

**⚠️ DEMONSTRATION REPORT - SYNTHETIC DATA**

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January 14, 2026

Client Case Study - Clean Metrics Studio

# Case Study: Sterling Capital Partners

How CMS Built Enterprise Analytics for an FCA-Regulated European Brokerage

## Client Overview

**Sterling Capital Partners** is an FCA-regulated brokerage firm headquartered in London, serving retail and professional investors across Europe. With £30B+ in annual trading volume and 45,000+ active clients across 13 countries, they required sophisticated analytics to optimize client experience, ensure regulatory compliance, and drive growth.

### Client Profile

- **Industry:** Financial Services / Retail Brokerage
- **Regulation:** FCA Authorised & Regulated
- **Annual Trading Volume:** £30B+
- **Fee Revenue:** £71M+
- **Active Clients:** 45,000+ across Europe
- **Markets:** UK (45%), Germany, France, Netherlands, Ireland, + 8 more
- **Products:** Equities, ETFs, Bonds, Forex, CFDs, Options, Funds

# The Challenge

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Sterling Capital Partners faced significant analytics challenges in a highly regulated, competitive market:

## Key Pain Points

- **Regulatory Reporting:** MiFID II RTS 27/28 reports consuming 40+ hours monthly
- **Client Segmentation:** No unified view of client value across asset classes and accounts
- **Best Execution:** Difficulty demonstrating execution quality across venues
- **European Complexity:** 13 countries, 5 currencies, fragmented client intelligence
- **Fee Leakage:** Unable to identify revenue optimization opportunities
- **Platform Metrics:** No visibility into mobile vs desktop vs API usage patterns

# The CMS Solution

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Clean Metrics Studio deployed a bespoke financial services analytics solution, built for regulatory compliance and commercial optimization.

## Phase 1: Data Integration & Compliance

- Unified 650,000+ trade records across all asset classes and platforms
- Integrated client profiles across ISA, SIPP, GIA, and corporate accounts
- Built MiFID II compliant data architecture with full audit trails
- Implemented GDPR-compliant cross-border data handling for EU clients

## Phase 2: Client Intelligence Engine

- Developed 5-tier client segmentation (HNW through Entry Level)
- Created lifetime value models incorporating trading behavior and fee contribution

- Built churn prediction based on activity decline patterns
- Implemented regional analysis across 13 European markets

Phase 3: Execution & Revenue Analytics

- Execution quality dashboard with price improvement tracking
- Fee revenue attribution by asset class, platform, and client segment
- Best execution reporting automation (RTS 27/28 ready)
- Platform performance metrics (Web, Mobile, Desktop, API)

Deliverables Package

Report	Frequency	Key Metrics
Executive Summary	Monthly	Volume, Revenue, Clients, NPS, Execution Quality
Trading & Revenue	Monthly	Fee Breakdown, Platform Mix, Order Types, Account Types
Asset Class & Market	Monthly	Asset Performance, Exchange Flow, Execution Metrics
Client Intelligence	Monthly	Segmentation, LTV, Geography, Acquisition Channels
Regulatory Support	Quarterly	RTS 27/28 Data, Best Execution, Transaction Reporting

Results & Impact

72hr

REPORT TURNAROUND

vs. 2 weeks before

+24%

TRADING VOLUME

Data-driven growth

**+19%**

FEE REVENUE  
Optimization wins

**40hrs**

MONTHLY SAVINGS  
Regulatory automation

### Quantified Business Impact

- **Revenue Optimization:** Identified £2.8M in fee uplift opportunities through segment-specific pricing
- **Client Retention:** Churn prediction reduced HNW attrition by 18%
- **Regulatory Efficiency:** MiFID II reporting reduced from 40+ hours to 4 hours monthly
- **European Expansion:** Data-driven market entry strategy for 3 new countries
- **Platform Investment:** Mobile app prioritization based on usage data, driving 30% adoption increase

## Client Testimonial

### "Regulatory-Grade Analytics, Commercial Focus"

"In financial services, you need analytics that satisfy the regulator AND drive the business. CMS delivered both. Their client segmentation alone has transformed how we think about growth. The regulatory reporting automation has freed up our compliance team for higher-value work. Clean Metrics Studio understands what it means to operate in a regulated environment."

— James Richardson, CEO, Sterling Capital Partners

# Why CMS for Financial Services

CMS Advantage	Financial Services Application
Regulatory Expertise	MiFID II, FCA, GDPR compliant analytics architecture
Enterprise Security	SOC 2 aligned, financial-grade data handling
Cross-Border Capability	Multi-currency, multi-jurisdiction client analysis
48-72 Hour Turnaround	Rapid insights for fast-moving markets
Principal-Led Delivery	Senior expertise on sensitive financial data

## Engagement Summary

### Scope

- 650,000+ trade records analyzed
- 45,000+ client profiles unified
- 7 asset classes tracked
- 5 client segments defined
- 13 European markets mapped
- 6 account types integrated
- 5 trading platforms monitored

### Deliverables

- 4 recurring monthly reports
- Quarterly regulatory data pack
- Client health dashboard
- Churn prediction model
- Execution quality monitor
- Fee optimization framework
- Ad-hoc analysis capacity

# Ready to Transform Your Brokerage Analytics?

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Clean Metrics Studio delivers enterprise-grade analytics for regulated financial services. Whether you're an FCA broker, wealth manager, or fintech platform, we provide rapid, compliant insights that drive growth while satisfying regulators.

## Get Started

- **Website:** [cleanmetrics.studio](https://cleanmetrics.studio)
- **Email:** [hello@cleanmetrics.studio](mailto:hello@cleanmetrics.studio)
- **Packages:** Starting at \$2,500 (Sprint) to \$15,000 (Summit)
- **Turnaround:** 48-72 hours on most analyses

**Compliance Note:** CMS analytics solutions are designed to support, not replace, regulated firms' compliance obligations. All data handling follows GDPR, FCA, and MiFID II requirements.

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Case Study prepared by [Clean Metrics Studio](#) | January 2026

This case study contains synthetic data generated for demonstration purposes. Sterling Capital Partners is a fictional company.