

# Asset Management

## Case Study

A renowned asset manager asked us to create a training program which would encourage a strong buy-side mindset in their new hires and give them the confidence to justify their decisions as investors.

### CLIENT

**A leading global asset manager**

### PROGRAM

**New analyst entry training**

### LOCATION

**London & Asia virtual**

### PARTICIPANTS

**20 new analysts (converted from intern programs)**

### INSTRUCTORS

**2**

Lead instructor:



**Deborah Taylor**  
—  
EX-BARCLAYS DIRECTOR

## 1. The Challenges



### Varied Backgrounds

Participants were all recent graduates, but not all from finance backgrounds. The training needed to be delivered globally, to cater to analysts in London and Asia, across multiple time zones.



### Desk-specific Needs

As well as delivering a rigorous technical skill set the training also needed to dive deeply into a range of topics and asset classes, relevant to their desk role.

## 2. The Solution

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### Level the Playing Field

A considered schedule of adaptive pre-work, delivered through our LMS, gave participants the best chance of being on a level playing field when the seven days began. Students took small quizzes on nine key topics, depending on their results, they could skip or dive into on-demand learning.



### Flexible Timing

To deliver the training effectively across different time zones, the core teaching day ran from 7am-2pm BST with case study activities on either side. From 5:30-7am for the Asia cohort and 2-3:30pm for the London students.



### Specialized Learning Groups

For the first five days, the analysts were taught together, covering everything from financial analysis to modeling and valuation. For the final two, they were divided into equities and fixed income streams to allow for more asset specific, case study heavy work.

**20**  
Participants

**7**  
Days

**12**  
Months Felix Access



#### STAGE 1

**Adaptive, asynchronous, pre-learning to cover financial accounting, income statements, working capital and modeling basics.**



#### STAGE 2

**Seven days of in-person training, delivered in person in London and virtually in Asia.**



#### STAGE 3

**Continuing education delivered through a 12-month subscription to Felix, playlists recommended focused on ESG, markets and derivatives.**

# 3. The Impact



## Desk-ready

The feedback from students was overwhelmingly positive, after the seven days of training, they felt ready to produce meaningful analysis and create value for investors.



## Continued Tailoring

We have worked on this program over several years, and the front office appreciate the fact that we have continued to tailor and update the program as their needs have changed, to deliver the best analysts possible. We work closely with stakeholders in the business, to gain their feedback on both delivery and content.

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