

# Equity Research

## Case Study

Previously, new equity research hires at this bulge bracket only had access to the general new analyst training program. This meant their research-specific skills were sometimes lacking. They asked us to create a specific program to ensure analysts could conduct research that created tangible value.

### CLIENT

**The equity research division of a global bulge bracket**

### PROGRAM

**New analyst entry training program**

### LOCATION

**London & New York**

### PARTICIPANTS

**30 new analysts**

### INSTRUCTORS

**1**

Lead instructor:



**Deborah Taylor**  
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EX-BARCLAYS DIRECTOR

## 1. The Challenges

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### Diverse Backgrounds

The cohort included both lateral hires and graduates from diverse academic backgrounds. Although they had already gone through the core new hire program, the analysts needed additional training to get them 'desk ready' for research.



### Specialization

In addition, these research analysts would go on to work in teams across a range of sectors. The training therefore had to prepare them for working in different sectors whilst also providing in-depth training on research-specific topics.

## 2. The Solution



### In-person

Previously training has been hybrid, with one location joining virtually. Teaching both locations separately, and in-person, makes for a better learning experience. This created better relationships between analysts, meaning they would continue to work well together across different asset classes. Credit research analysts were also included in some sessions so they could benefit from the training whilst helping build cross-asset relationships.



### Plug Skill Gaps

The program filled research-specific technical skills gaps, including analyzing company results, research forecasting and making investment recommendations. We maintained a strong case study focus and included mock results days and morning meetings to simulate the analysts' future responsibilities.

**30**  
Participants

**8**  
Days

**12**  
Months Felix Access

#### STAGE 1

**Eight days of intensive research analyst training (for London and New York teams respectively), following on from the broader corporate finance training provided for new analysts across the investment bank.**

#### STAGE 2

**Continuing education delivered through a 12-month subscription to Felix.**

#### LEAD INSTRUCTOR



# 3. The Impact



## Desk-ready

Participants and the internal L&D team agreed that there was a massive step up in the quality and relevance of the training to the desk role. Analysts were engaged with continuing education as they enjoyed the initial eight days, where they were familiarized with Felix.

**“It was spectacular! THANK YOU both for making it happen!”**

**- L&D head**

## Felix

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