

BUILD AND MAINTAIN FINANCIAL MODELS WITH REDUCED COST AND FASTER TIME TO MARKET

THROUGH EVALUESERVE'S PATENTED AUTOMATED FINANCIAL MODEL **UPDATE SOLUTION**

Our patented Financial Model Update Solution leverages proprietary algorithms, sector-specific taxonomy, best-in-class OCR technology, and agile integration architecture to automate the process of updating and building financial models for Shadow Coverage, Initiation, and Earnings Updates.

The financial model update process is optimized through our built-in validation mechanism to ensure 100% accuracy, faster turnaround time, multiple format & language capabilities, detailed audit log, and 24x5 support.

AUTOMATED MODEL UPDATE SOLUTION

Efficient. Accurate. Customized.

MULTIPLE FORMAT & LANGUAGES

Capable of reading and populating data from PDF, JPG, PNG, TIFF, Excel, and scanned copy

in multiple languages.

FASTER TIME TO MARKET

Average turnaround time of 10-30 min, backed by 24x5 global support.

30% + IN SAVED COSTS

Fixed price per model with ability to integrate data from IR presentation, tear sheet, SEC filing, etc.



Built-in validation mechanism to eliminate quality checks and manual errors.

DATA SECURITY & AUDIT LOG

Highlights any change in line item, new line item or missing reported numbers.



No change in analyst model with flexibility to incorporate analyst requirement.



CASE STUDY SPOTLIGHT

BOOST PRODUCTIVITY AND TIME TO MARKET: 40%-70% SAVINGS IN TIME



THE CHALLENGE:

Our client's analyst teams needed a solution to i) expand coverage without increasing dollar spend, ii) update their models faster without compromising data accuracy, and iii) deal with peaks in workflow.



THE SOLUTION:

Our team used our patented **Automated Model Update** Solution that automates the process of importing data from companies' financial statements to analyst's financial models, while keeping the structure and format of the model intact.



BUSINESS IMPACT:

Our solution enabled the client to i) achieve 40%-70% time-savings during earnings, ii) improve data accuracy by 100%, iii) reduce costs by 30%+, and iv) manage peak workload during earnings.

DO MORE WITH LESS UTILIZING OUR TECHNOLOGY PLATFORM

Accelerated Process of Financial Model Build & Maintenance

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- Transfers data from filings into analyst model in one click.
- Check restatements and update model with restated number.
- Rolls over values/formulas for upcoming quarters.
- Applicable for updating periodic data as well e.g. auto sales number, operational data etc.

- Automated flags/alerts notify users of any changes (line-item, structural changes).
- Error log highlights missing value, new line items, etc.
- Includes built-in validation and detailed audit log.
- Digital Repository for all historical filing and updates, facilitating faster audits.

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- Ready-to-deploy templates for 24 industry groups + 69 industries.
- Comprehensive end-to-end support for shadow coverage.
- Plug and play approach requiring no change in analyst's model.
- Flexible solution designed for seamless integration.

2. ENHANCED DATA ACCURACY

WHAT NEXT?

Learn how Evalueserve's Automated Model Update Solution can enable your team to streamline the process of model building and maintenance.

CONTACT AN EXPERT

POWERED BY MIND+MACHINE™

Evalueserve is a leading analytics partner powered by mind+machine™, that helps clients get the most out of their core processes. We combine insights emerging from data and research with the efficiency of digital tools and platforms to design impactful solutions, tailored for your business needs.