

# The Search for High-Quality Data

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**The Client:** An online brokerage firm catering to the retail market in China with an Internet-based and mobile trading application.

**Users:** The Product Group responsible for developing and continually enhancing the firm's capabilities.

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This brokerage firm offers an Internet-based and mobile application for individual investors located in China looking to trade Chinese A-shares, as well as stocks listed on U.S. and Hong Kong exchanges. The application includes data on individual companies, technical indicators, and global news, all available in Simplified Chinese and Traditional Chinese scripts in addition to English.

## **Pain Points:**

The firm's longer-term vision is to create a state-of-the-art platform for self-directed Chinese-speaking investors that includes information and trading capabilities for multiple country markets. To help achieve this goal, the Product Group wanted the application to be powered by high-quality data. In particular, there was a strong interest in upgrading the source of data for U.S.-listed companies.

## **The Solution:**

The S&P Market Intelligence ("Market Intelligence") team met with the Product Group to discuss its detailed data for U.S. public companies and to do an online demonstration to showcase the breadth and depth of the offering. Market Intelligence's locally-based support team was highly knowledgeable about this data and able to quickly answer any questions that arose. The Product Group was impressed with the offering and the level of support they were receiving and chose Market Intelligence for its financials for U.S. companies in the latest instance of filings, with five years of history on a rolling basis. The implementation went smoothly. The old and new systems ran in parallel for a period of time to check that the data was fully integrated into the client's application and tested.

An on-the-ground support team played a critical role in helping the Product Group quickly get up to speed on how to use the U.S. data.

The firm's next strategic focus was to upgrade data coverage for the Hong Kong market to include financials in all instances of filings for a global universe of companies, along with additional metrics, such as industry-specific and segment details. The Product Group also

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selected Ownership information for global public companies. This included historical equity ownership data, consisting of institutional, mutual fund, and insider/individual owners. Portfolio performance statistics, aggregated investor classifications, and the public float data were part of this, too.

### Key Benefits:

The Product Group values three important aspects of the Market Intelligence solution:

- **Access to comprehensive, high-quality data.** The client's user base now has access to the essential intelligence they need to help support their decision-making.
- **Proactive support from a locally-based team that can react quickly.** Market Intelligence's on-the-ground team played a critical role in forging a strong relationship with the Product Group, both pre- and post-sale.
- **A clear understanding of the firm's strategic vision and its longer-term needs.** Ongoing discussions with the client keeps the Market Intelligence team up to date on the firm's future plans and the type of products and services that may be needed.

An upgrade to a set of financials for a global universe of companies quickly followed the purchase of U.S. data.

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