

Case Study

# PowerPoint Production Support for a Leading Investment Firm



## About the Client

- A leading investment firm that focuses on opportunities in Iraq, the greater Middle East, North Africa and Asia

## Goals

- The chief investment officer (CIO) of a leading Middle Eastern investment firm was to make an investor presentation to the board. The investment relations team (IR team) had collected raw data on various funds and their performance, and on their existing portfolio. They also had a rough structure of the PPT that they wanted to present during the board meeting

## Results & Value Add

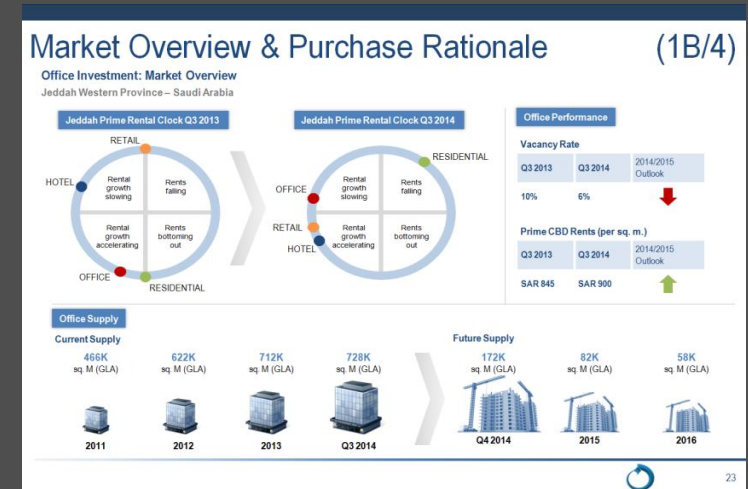
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- The client could make an effective presentation at the board meeting
- They were able to off-load the heavy lifting work of back-end research, PowerPoint production and preparation of charts, etc. to RocSearch and focus on its core activity of managing investor relations

# Research Methodology and Approach

- The team set up a kick off call with the CIO and the IR team and had detailed discussions on their expectations from each section of the final deck
- We collated these expectations and highlighted its data requirements from the client
- The team started work on the PPT and first created a template for the client, keeping in mind the design considerations of the investment firm (client)
- A draft structure along with the presentation plan was shared with the client. After getting a go ahead, we used the data shared by the client to create a rich and succinct presentation with vivid illustrations

## Screenshot



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## Contact Us

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