



## Case Study

# PowerPoint Production Support to an Investment Firm



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### About the Client



- A leading investment firm, focusing primarily on Iraq, the greater Middle East, North Africa and Asia

### Client Objectives / Goals



- To make an investor presentation based on the collected raw data on various funds and their performance, and on their existing portfolio for a board meeting

### Approach and Methodology



- Based on the detailed discussions with the CIO and the IR team on their expectations from each section of the final deck, highlighted the data requirements from the client
- Created a template for the client, keeping in mind the design considerations of the investment firm
- Shared a draft structure and the presentation plan with the client
- Post consensus, used the data shared by the client to create visually intuitive presentations

### Sample Output



### Results / Value-add



The client could make an effective presentation at the board meeting

The assignment helped the client 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