

# Guiding a UK-based private bank in building and running proprietary indices in real estate subsectors



- **Market Assessment**
- **Index Preparation**
- **Performance Tracking**



Image by: Olga Lioncat Source: Pexels

## Business need

- A UK-based private bank focused on alternative assets, including real estate, wanted to assess, track and benchmark the performance of real estate subsectors with its investment returns on an ongoing basis.
- It engaged RocSearch to help understand the market, drive insights on market performance and make informed decisions.

To create proprietary indices focused on the UK's real estate market.

### The client outlined two key reasons for selecting RocSearch:

- Our unique investment research and advisory capabilities.
- Our experience and understanding of the real estate sector.

# Approach & Methodology

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- Our strategic research and advisory team understood the client's decision context and strategic requirements and focused on various sub-sectors such as retail, data centres, self-storage, hotel and property. We also brainstormed and proposed to build and maintain a market-cap-weighted sub-sector index to assess, track and benchmark performance.

RocSearch created a comprehensive market-cap-weighted sub-sector index and identified real estate investment trusts (REITs) for each subsector, in addition to building a dynamic dashboard and implementing a system to update the indices regularly.

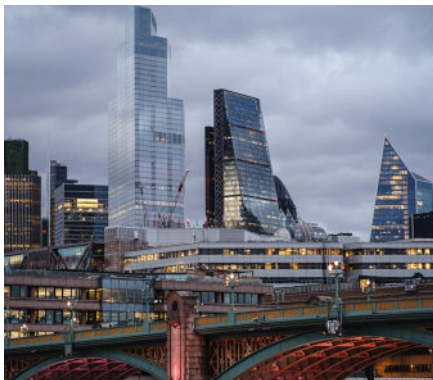


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- We identified relevant companies/REITs in each sub-sector for analysis. Moreover, we developed customised indices and back-tested data analysis with the client to get inputs and to ensure better alignment with the end goal.
- Further, we prepared a dynamic dashboard to view and benchmark performance and implemented a mechanism to periodically update the indices and provide qualitative insights to substantiate any major changes.

# Business outcomes

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- The study provided the client with details on the UK's real estate sub-sector performance.
- It also enabled the client to focus on driving insights and strategy by providing foundational content and data.
- The client's customers used and quoted the indices in their pitchbooks and investor presentations.

The study helped the client drive its strategy and enabled its customers to use indices in their pitchbook presentations.

## About RocSearch

Founded in 1999, RocSearch has been a pioneer in empowering our clients to overcome challenges and realize their goals. Our strength is delivering research and advisory solutions through managed and dedicated teams that produce the expert intelligence our clients require to gain a true competitive advantage.

We draw on proven expertise to deliver consistent value across all types of business requirements: ranging from digitization and analysis of business, financial, or customer data to the provision of 'act-on' insights for the most challenging business problems.

Our longstanding client relationships bear testament to the enduring value we create, alongside our consistent reliability and absolute discretion. We take great pride that many of the brightest global companies rely on us to help them achieve top-line growth, operational efficiency and increased profitability.

[www.rocsearch.com](http://www.rocsearch.com)



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