

# Stream of Unique Insights for Asset Managers in the Technology Sector

An analyst at an Asset Management firm came to Coleman seeking fresh perspectives on a tech company that was bucking market trends. He joined two relevant Hosted Event calls where he was able to gather unique market insights.

## THE CHALLENGE

### Sharpening Your Edge

As a senior equity analyst for an Asset Management firm, Ben is responsible for conducting comprehensive market research. Whether he is investigating a specific growth stock or a trend in the tech industry, Ben's edge has always been finding unique perspectives on current market intelligence to improve his holdings and models.

Ben typically started his research process with sell-side insights to explore industries and get market intelligence. He would complete his research process using Coleman's 1-on-1 calls, which allowed him to vet his ideas and assumptions through direct conversation with industry experts.

Ben recently reached out to Tom, his Client Manager at Coleman, to request support in gathering information on Facebook, which was bucking market trends.

Tom, leveraging his familiarity with Ben's research process, proposed a solution that would give Ben a better way to access current, unbiased market intelligence on Facebook for his current project, and across the technology sector at large. Tom recommended that Ben supplement his typical research process with Coleman's Hosted Events.

“

*I was dedicating a lot of time gathering information the same way. I wanted a better way to get unique and current information. It was refreshing to have Coleman show me a way of doing just that.*

— Ben, Senior Equity Analyst at an Asset Management Firm

## THE SOLUTION

### A Steady Stream of Unique Insights

Tom identified an upcoming Hosted Event featuring a senior company executive at one of the largest Facebook Preferred Marketing Developers (PMD). The executive was scheduled as an expert for the event and qualified to provide insight on trends in Return on Advertising Spend (ROAS) across various advertising platforms. Ben joined the event and got a unique perspective regarding the industry's growth strategy.

The following week, Tom contacted Ben about another related Hosted Event, featuring a senior advertising executive at a global insurance company. The executive offered valuable insight on the allocation of advertising budgets on various ad platforms, including Facebook. Ben couldn't join that call live but Tom arranged for Ben to listen to a replay of that event. Tom also had the accompanying presentation sent to Ben so he could refer to it as needed.

The information Ben gathered during these two events allowed him to effectively corroborate his team's assumptions as well as adjust some models based on these new perspectives.

“

*Ben always began his exploratory research with sell-side information. He found that this information was rarely specific or current enough, and would then spend time vetting the wrong assumptions.*

— Tom, Coleman Client Manager

## THE RESULTS

### First-Hand Knowledge Through Hosted Events

Ben has found Coleman's Hosted Events to be an extremely effective method for uncovering current and specific expertise from in-demand experts. He currently signs up for more than 20 Hosted Events each quarter and has also referred other equity analysts at his firm to Coleman's Hosted Events. He even receives emails notifying him of all upcoming events, along with links to replay previous events.

Ben was even more intrigued that Coleman's sector-specific analysts screened all presenting experts and worked with them to develop questions, themes, and angles that were both compelling and unique.

Each week, the Coleman team identifies and arranges 35+ Hosted Events across all industries, addressing topics most relevant and important to buy-side analysts. Since Coleman's industry analysts do the preliminary work on the topic and facilitate the event, asking the probing questions and helping guide unbiased discussion throughout the call, Ben is able to save valuable time. It is clear that Coleman's Hosted Events give Ben the advantage he was looking for.

“

*Coleman helps me identify relevant topics and angles and matches me with the right experts. This limits bias and improves diversity in my research process and makes Hosted Events very valuable in helping me understand a wide range of industries and topics.*

— Ben, Senior Equity Analyst at an Asset Management Firm