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NLP and Dashboard Application

OVERVIEW



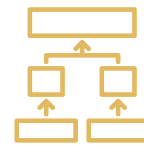
CHALLENGE

The ESG Investment Team at a large asset manager needed a more efficient way to analyze company reports to keep a watchful eye on portfolio companies and ensure sustainable returns.



SOLUTION

The Treliant team built tools to extract data from company reports, parse the content for issues, and visualize the datasets for further analysis.



APPROACH

Treliant built a scraper application that is capable of extracting data programmatically from the company reports received by the ESG Investment Team. Using NLP, the application is able to identify and flag material issues for review. We also built an application to visualize datasets and to highlight data-related issues for action by the investment team.

RESULTS

- ✓ The applications allow the client to analyse their investment portfolio more effectively and extract more value from the third-party company reports they buy.
- ✓ Material issues are now programmatically identified and flagged to be addressed by the investment and fund management teams.
- ✓ The scraper application allowed for more efficient analysis of company reports, helping the ESG Investment Team to quickly identify material issues.
- ✓ NLP enables the team to extract insights from the text of the company reports, making it easier to highlight issues for review and action.
- ✓ The visualizer allows the investment team to spot data anomalies, again resulting in a more effective management of portfolio companies.

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