



Credit Data Ops Checklist

1. Do you have an integrated IT platform that consolidates fundamental credit models across your research team to support cross-team, cross-market relative value and comparative analysis?
2. Do you actively cover at least 80% of your investable universe?
3. Is live reporting incorporated into your trading / investment decision-making in under 30 minutes?
4. Do you have systematic market signals in place that guide how you prioritize and allocate your team's resources?
5. Do you have at least one full-time dedicated computer programmer in your research team?
6. Does your research team spend no more than 1/3 of its time each week tracking down financial disclosure and entering raw data into spreadsheets/systems?
7. Does your research team have a specific data budget that is separate from headcount allocation and its budget for traditional third-party support services?
8. Is your team encouraged and/or incentivized by management to pursue analytical innovation actively in your business?

How advanced is your firm's credit data operation today?



Results

How many “Yes” replies did you register?

- **6 or more:** Indicates an advanced data strategy—from our experience, you are running your business at the leading edge of the market and are strategically positioned to continue leveraging innovation, leading to further differentiation versus your peers.
- **3 to 5:** Indicates an emerging data strategy—you have implemented important components of best-in-class credit data operations and should be able to continue expanding the effort; however, now is not the time to pause as there is much more to achieve.
- **0 to 2:** Indicates minimal-to-no data strategy—while not necessarily an outlier in today’s market, this report is meant as a wake-up call for you; now is the time to prioritize your data investment so you do not find yourself in a near-term competitive disadvantage versus peers who currently score higher in this survey.