

# Client Case Study

## Jefferies Hong Kong LTD.

Financial Intelligence  
Informa



Jefferies, the global investment banking firm, has served companies and investors for over 50 years. The firm provides clients with capital markets and financial advisory services, institutional brokerage and securities research, as well as wealth management. The firm provides research and execution services in equity, fixed income, and foreign exchange markets, as well as a full range of investment banking services.

### How we help

Jefferies Hong Kong Limited, a client of Informa Financial Intelligence, has subscribed to EPFR Flow and Allocation data and insight since 2011.

Kenneth Chan, SVP Global Quantitative Strategist at Jefferies HK Ltd., and his team use a range of sources to build out their reports and EPFR's Flow and Allocation data is a key component.

Mr. Chan onboarded EPFR when he joined the business, as to him, "the data coverage was good – in particular, the country flow and allocation datasets are very useful to me and my team at Jefferies. Since working with EPFR, we have also noticed the Bond and Money Market insights have improved and we are able to derive value from those too."

In Mr. Chan's role as a quantitative strategist, utilizing a range of reliable data points to create a clear picture of what is happening in the market is central to the reports compiled and issued by his team. He commented "We create reports each week that equip both internal stakeholders and clients with the insights they need on market positioning to make informed decisions."

"EPFR is a data set that is useful as a comparison across markets, regions and asset classes. The data will tell you what is happening from one region to another meaning you can better understand investor sentiment."

**KENNETH CHAN**, SVP GLOBAL QUANTITATIVE STRATEGIST,  
JEFFERIES HONG KONG LIMITED

### Considering EPFR as a data provider:

Informa Financial Intelligence EPFR data sparks alpha generation as a sentiment indicator in both bottom-up stock picking and top-down asset allocation investment strategies across asset classes. EPFR data and insight helps portfolio managers, asset allocators, strategists and research teams understand where money is moving, how fund managers are investing that money, and what impact those shifts are having on geographies, sectors, industries and securities.

Mr. Chan would refer EPFR to others who are considering a flow and allocations data provider, commenting; "EPFR is a data set that is useful as a comparison across markets, regions and asset classes. The data will tell you what is happening from one region to another meaning you can better understand investor sentiment."