



DELIVERING INSIGHTS THAT DRIVE INVESTMENT STRATEGIES

Texas's Largest Public Retirement System Leverages Agile Analytics to Improve Financial Decision Making

The Teacher Retirement System of Texas (TRS) was looking for ways to improve decision-making based on key financial metrics data from their investment portfolios. As the sixth largest public pension fund in the United States, the retirement system relies on analytics and reporting technology to extract insights that help them manage their investment opportunities and strategies for their fund of \$151 billion.

THE CHALLENGE:

The TRS's Investment Management Division (IMD) was relying on an investment and analytics software that was difficult to navigate and didn't provide for a user-friendly experience. The software lacked the features to do the deep, comprehensive ad hoc queries they needed, limiting their ability to get insights without exporting the information to complex spreadsheets. These spreadsheets were difficult to maintain and keep current, requiring specialized historical knowledge of how they had been built and how the calculations were being performed. TRS IMD leadership wanted to provide better tools to streamline the investment analysis and decision-making process so they could compete more efficiently to secure the best globally available investments to drive additional returns for the retired teachers in the State of Texas.

THE SOLUTION:

After thoroughly evaluating different data analysis, visualization, and reporting solutions, TRS selected Microsoft Power BI. In order to ensure the best benefit from Power BI, TRS chose Catapult, a Global Microsoft Partner based in Austin, Texas with a strong history of success rapidly deploying data platform solutions using the latest on-premises and cloud-based technologies. Catapult worked closely with the TRS IMD technical and business leadership to define the list of desired reports and visualizations as well as the right data model and source data to provide the insights.

Catapult and TRS were able to leverage existing proprietary data repositories, bring in additional data to enhance the analysis, and rapidly build out a data model to allow standardized reporting and data calculations. Working closely together, TRS and Catapult were able to eliminate multiple highly complex spreadsheets and surface up this information and additional insights via secure reports, data visualizations and dashboards. TRS can now more easily examine and interact with historical and current investment data to provide enhanced investment analysis, decision making and reporting to management.

AGILE ANALYTICS:

To increase the speed at which insights were delivered to TRS, Catapult used its Agile Analytics methodology in an engagement to quickly glean additional information from available data. Leveraging its agile methodology, Catapult conducted a series of two-week sprints, allowing TRS to gain valuable insights early and accurately.

This new solution gave TRS better insight into their data, easier integration with their existing software, and data repositories, and standardized calculations across multiple reports. Through constant support and collaboration with the Catapult team, TRS gained all new data dashboards around key financial metrics from their pension fund, such as gains and losses, internal rate of return, fund size, time-weighted rate of return, and realize gains and losses. Additionally, Catapult also helped combine data from funds and underlying holdings into one model that allowed TRS to explore financial metrics across different levels of their portfolio.

TRANSFORMATIVE IMPACT WITH AGILE ANALYTICS:

- **Rapid delivery of insights** using Catapult's Agile Analytics Methodologies to deliver new features every two weeks
- **Empowerment in investment strategy** through actionable, data-driven insights and historical trend analysis
- **User-friendly software** with integration of centralized, easy-to-use reporting, visualizations, and dashboards
- **Improved ability** to manage reporting on patient data
- **Reduced maintenance reporting** to drive efficiencies that better support the organization while decreasing reliance on complex spreadsheets



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