From Static to Dynamic: Freeing Valuable Investment Data from PDFs

For more than 40 years, this firm has provided research on global macroeconomic trends that helps financial institutions make informed investment decisions.

Challenge

The firm’s vast portfolio of valuable economic and investment data was stored in static PDF reports that could not be easily manipulated or collectively searched for identifying trends. A client survey revealed requests for several enhancements, including the ability to:

- repurpose research—particularly charts—for presentations
- identify analysts’ counterarguments across a wide body of research
- annotate, share, and customize research
- access research from mobile devices
- scan research for trends
- interact with the firm’s analysts and editors

Solution

Meeting these requests required digital content that could be quickly retrieved and easily repurposed. Aptara made the research firm’s content digital and discoverable across multiple platforms by:

- employing semantic tagging that provides powerful search capabilities and more relevant search results
- architecting the tagging structure in collaboration with the firm’s subject matter experts
- reading five years of financial and economic research to identify and tag each component—as a key theme, trade recommendation, counterargument, chart reference, and so on
- adding structural tags that facilitate omni-channel publishing
- designing and building a dashboard that features custom analyses reporting
- using responsive design for displaying properly across different mobile devices
Result

Powered by a custom semantic tagging engine, the research firm’s search platform:

• makes it easy to find, share, and combine data
• conveniently access data from mobile devices
• includes a customizable dashboard
• offers customized alerts and personalized data
• includes 45,000 searchable charts (from 5 years of data)
• enables real-time content updates

Aptara’s solution continues to provide the firm with a powerful, interactive search platform that makes vast volumes of content significantly more useful—and lucrative.

...