

Research (Funds & DFM)

What do we do and why do we do it?

The Funds & DFM Research team researches and provides up-to-date information on Funds and Discretionary Fund Management (DFM) enabling Defaqto to sell various data-focused solutions to clients within the UK financial services industry.

The team covers the following fund and proposition data areas (which is continually expanding):

- UT/OEICs
- Life Funds
- Pension Funds
- ETFs
- Investment Trusts
- Discretionary Bespoke propositions
- MPS propositions
- MPS portfolios

This data is used to fuel Defaqto Engage, a tool used by over 7,000 financial advisers to help them deliver client-centric, compliant financial advice. It is also used to create our Diamond Ratings, Star Ratings and Risk Ratings, which are used by some of the biggest names within the fund management industry.

Defaqto captures data on the usage and behaviour of financial advisers using our adviser facing software, which is used to fuel Defaqto Analytics; a reporting and consultancy proposition that's targeted at Fund Managers and DFMs. The team has taken on responsibility for validating and assessing the output of the Analytics data and selecting relevant data for Analytics reporting.

How are we organised?

The team is currently made up of 4 people: a Research Manager and (soon to be) 3 Researchers.

Researchers tend to work on one specific area in order to build specialism, but, everyone on the team is encouraged to learn other areas to expand their cross-over skillset. This not only supports peaks in workload, it also supports the longer term aim of having researchers understand both Funds & DFM areas in greater detail.

Who do we work with?

Internally, Researchers within the team work very closely with the Insight & Consulting team (who create our Ratings, publications and panels) and the Sales team (who sell the products & services that are powered by the data we research). The team also liaises with the Customer Success team regarding queries from financial advisers about the data within Defaqto Engage.

As part of on-going fund & proposition research, team members have daily external contact with fund managers and DFMs to ensure the accuracy of the information that is being collected.

What's it like to work in our team?

Working within the team comes with its pressures, but also comes with the flexibility to be able to manage your own work. The biggest challenge we face is that of maintaining a high level of attention to detail and balancing this with productivity.

Support and development is available and on hand should anyone need it, however each person is responsible for their own work, improving efficiencies to maintain excellent standards, being left to their own devices much of the time.

We operate a flexible approach to working hours, allowing people to adjust their hours to suit their personal circumstances wherever possible and also expecting people to proactively adjust their hours to suit the workload at peak times of the year or in response to particular commercial or operational requirements.

Overall, we try to create a friendly and suitably relaxed working environment and empower individuals by giving them responsibility.