



Keys to Securing Market Intelligence

If you are responsible for managing investments or financial portfolios the value of industry expertise and market intelligence cannot be understated.

Many fund managers, investment brokers, private equity firms, and private placement organizations, both large and small, possess either in-house expertise or utilize the services of industry advisors to provide and augment insight into the markets and players that is not often found through traditional research. Many national expertise firms exist to provide platforms for analysts and fund managers to tap into this knowledge base and gain the information necessary to fill in the gaps and enhance their understanding of the industries and companies in which they have holdings or seek to make entry.

Another useful and beneficial tactic used by many investment firms is to maintain a list of qualified industry experts that can be called upon when needed. Many competent firms specialize in particular industries and even geographies to provide expedited and very relevant information for a simple phone consultation or can be retained for specific periods of time. The firm's information is typically retained in-house for the primary markets and industries that pertain to the investment profile of their firm and clientele.

While there are reams of information available online, much of it will require extensive investigation and vetting in order to be considered valuable. The sourcing of much of this

information is provided from companies that have not actively participated in these markets and is oftentimes derived from the review of financial statements and resources available in the public domain. Some also conduct industry surveys and generate reports that are available for purchase.

The other factor in online research is time. As we all know, timing is critical and the sooner you can have confidence in the information you possess, the greater the opportunity for success and more responsive your investment decisions can be.

When it comes to investment decisions it is often wiser to seek council from those with a first-hand exposure to the specific industry in question. The information can typically include insights on competitive pressure, company leadership, pricing, market share, strategic advantages, new products in development, expansion estimates, industry and company exposures, and of course provide confidence and verification of going forward estimates and projections made by the company.

In today's economy knowledge is king, and the information you need to make the best decisions possible is readily available to support your company and your customers.

Mark J. Muratore – President

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