Crisil
Integral IQ



Case study

AI-driven research workflows cut analyst turnaround time by up to 65%

Background

A US-based asset manager sought our help to shorten the time gap between data release and investment research workflows. We enabled faster turnaround by developing a suite of artificial intelligence workflows covering the three core phases of research (earnings call interpretation, financial statement analysis and research note drafting).

Challenges

- Manual transcript parsing to extract guidance and gauge management tone required repeated reading and cross-referencing
- Repetitive ratio, growth-driver and balance-sheet analysis was taxing during earnings seasons
- Note structure and quality varied across analysts, with investment theses being compiled manually from scattered sources
- Tight post-earnings deadlines raised the risk of missing or misattributing guidance and red flags
- Lack of standardized logic led to heavy dependence on the analyst's rationale, causing variations in output quality and turnaround time

Our solution

We designed three purpose-built AI workflows that share common grounding and formatting standards:

- Earnings call interpretation: Extracts guidance figures and management tone, anchored in verbatim quotes, and works consistently on transcripts of any length or complexity
- Financial statement analysis tool: Calculates ratios, traces growth drivers and assesses balance-sheet strength
- Research note drafting: Generates a thesis covering positives, risks and valuation from the source material, ready for client use with minimal editing

Impact

65% reduction in turnaround time on earnings calls through AI-driven extraction of guidance and tone from transcripts

50% faster financial statement analysis, surfacing ratios, growth drivers and balance-sheet red flags

55% reduction in note drafting time through standardized, source-grounded thesis generation

Faster turnaround, greater consistency and lower review overhead

About Crisil Integral IQ (formerly Global Research & Risk Solutions)
Crisil Integral IQ delivers solutions and actionable intelligence to top financial institutions, driving strategic transformation, risk optimization, and operational excellence. Our offerings across research, risk, lending, analytics and operations have empowered clients to navigate complex markets, mitigate risks and unlock new opportunities. Our domain expertise, innovative solutions, future-ready technologies such as AI and data science give clients the confidence to accelerate growth and achieve sustainable competitive advantage. Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East.

For more information, visit IntegralIQ.Crisil.com

About Crisil
Crisil is a global, insights-driven analytics company. Our extraordinary domain expertise and analytical rigour help clients make mission-critical decisions with confidence.

Large and highly respected firms partner with us for the most reliable opinions on risk in India, and for uncovering powerful insights and turning risks into opportunities globally. We are integral to multiplying their opportunities and success.

Headquartered in India, Crisil is majority owned by S&P Global.

Founded in 1987 as India's first credit rating agency, our expertise today extends across businesses: Crisil Ratings, Crisil Intelligence, Crisil Coalition Greenwich and Crisil Integral IQ.

Crisil's global workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East, setting the standards by which industries are measured.

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