

Three veterans of the Financial Services Industry, Judith Humby, Sheena Clark and Wendy Cartledge, have established a consultancy to help both vendors, consumers and consultancies in financial services to simplify and streamline their business decisions. Banking and asset management clients often require bespoke research and information to help them with decision making, particularly in this world of cost management and regulatory compliance.



Vendors too have been asking for help to explain and promote their products to existing customers and new prospects. Having covered the majority of the market sectors, in roles such as data user, project manager, market data analyst, consultant, CAO, data vendor and business analyst, the level of expertise that can be provided by FM is of a depth and breadth that no typical consultancy teams can offer. We also offer products which solve specific problems in the risk arena, namely Global Trade Reporting Aggregator (GTRA) and EBA Stress Test Suite.

AREAS OF EXPERTISE

- All major financial markets
- Regulatory & Risk
- Data Types - market, research, reference & news
- Contributed data
- Desktop Applications, Infrastructure, Web services and Publications
- Data feeds – real time, intra-day, historical & static
- Data distribution technology



Behind-the-scenes capabilities - on demand and ad-hoc

For clients not wishing to take on expensive consultancy commitments, we can provide services such as the following, in an ad-hoc and on-demand way:

1. Advice for vendors on how to position and promote products using client feedback and competitor reviews, together with first hand user experience
2. Bespoke research for clients that are:
 - a. seeking alternatives to incumbent data products
 - b. investigating new products to meet new or changing business needs
 - c. optimising contract renewal processes
3. Back-up analysis and research for consultants based at client sites, who lack either the time or privacy to research solutions on site. This could be during cost reduction projects or vendor replacements etc.
4. Freelance research into industry trends, regulatory changes and product reviews
5. Additional writing services to support clients or consultants, such as copy writing for pitches, proposals, proof-reading, presentation creation etc.
6. Company website review and proposal writing, in order to bring a fresh perspective and clarity to the prospective buyer, for clients wishing to maximise their marketing reach



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The core team that works at FM has over 60 years' financial markets experience collectively. Having worked on many different sides of the industry, they have a deep, broad and current understanding of the full picture of data and technology requirements and consumption. To minimise costs, FM consultants work remotely, producing un-badged documentation for the client, to a pre-agreed timescale. All team members, including any outsourced consultants, are degree-educated and fluent writers in English, ensuring that all documentation is ready to put in front of clients immediately.



EXAMPLES OF WORK

- Data comparison between the market's core research platforms
- Key low latency market data feed suppliers
- News delivery platforms: comparison of data and functionality
- Energy publications vendor analysis
- Insurance market analysis vendor comparison
- Sources of cleansed swaps traded data (for Dodd Frank / EMIR compliance)
- The distressed debt research market
- Replacement solutions for end-of-life products
- Creation of marketing material for data distribution platform
- Creation of marketing material for traded swaps data tool

- Multi-asset class coverage with multi-regional availability

The Core Team

WENDY CARTLEDGE

Wendy spent over 10 years at Lehman Brothers, starting out as a business analyst, moving through derivatives systems implementation to derivative operations management and finally settling in a CAO capacity, both for the IT and the Wealth & Asset Management divisions.

Having also been CAO and head of IT and Operations for a Private Client and Fund Management company, Wendy gained invaluable experience working with data and technology solutions across a broad spectrum, which became advantageous when she embarked upon a research career.

Now, Wendy enjoys the work as a research analyst as it uses her business and IT knowledge, keeps her in touch with the market and allows her to expand her expertise into new areas.

Having found an aptitude for writing, she is happy to tackle any subject and enjoys building vendor and client relationships.

SHEENA CLARK

Sheena is a market data entrepreneur, with experience across many areas of Financial Information Services, spanning 23 years. She has particular expertise in data publishing and contributions, including inter-dealer Broker feeds & OTC content, news & company disclosures, as well as European Market Regulation, for example MiFID, Transparency and EU Savings Tax Directives.

She has worked with all the major IDBs, (ICAP, Tullett Prebon and BGCantor) commercialising and producing data products, and with major data vendors, acquiring and selling data. She has been instrumental in building and selling both the UK's leading financial wireless service and a multi-contribution software solution to Thomson Reuters.

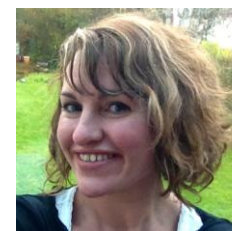
JUDITH HUMBY

Judith started as a client trainer across all desktop and trading solutions for Reuters in 1996. She followed with roles in many tier 1 banks in London and New York, covering market data analysis and management.

As well as a consultant to a Spanish market data firm, she has spent the last 6 ½ years as a senior analyst / manager at 3d innovations (3di) in the Research and Analysis (R&A) team. The core element to the role entails researching and producing bespoke reports on market data vendors and products.

Her experience spans data and technology products for both buy- and sell-side clients across all markets, from equities to energy.

She enjoys problem solving, researching, writing and maintaining close relationships with vendors and clients.



- Depth and breadth of industry knowledge for comparatively lower cost, on a pay-as-you-go basis

- Experience across, IT applications, infrastructure, data and business lines

- Strong vendor relationships and excellent client rapport

- Collaborative relationship, sharing ideas

- Ability to turn around requests fast and out of typical office hours