RESEARCH EDITORS

Specialists in financial research editing

Call: +44 20 4551 1051 Email: info@researcheditors.co.uk Follow: Web: researcheditors.co.uk

Who we are

- Research Editors is the world's largest provider of high-quality editing and related services specialising in the financial sector.
- Established in 2010, we have a team of over 25 editors, supervisory analysts and research principals in all major timezones.
- Our clients include brokers, investment banks, fund managers and rating agencies.

What we do

- Editing: Our team of editors edits a wide range of research and marketing publications. These include fixed income, equity and economics research and commentary from both the buyside and sellside.
- Supervisory analyst service: Our team of FINRA Series 16 supervisory analysts ensures research is compliant with all relevant regulations. This service is ideal for firms without headcount for permanent supervisory analysts.
- Research principal service: Our FINRA Series 24 qualified research principals supervise research activities, working closely with compliance, management and supervisory analyst teams.

How it works

Each client's needs are different (see table below) so we offer a bespoke service to fit their volume, service and coverage hours requirements. This is made possible by our global team who work remotely from all major time zones. Once we agree the requirements, clients give us a secure remote login to their network or email us their documents directly. If applicable, FINRA licences are registered by the client. We then review the documents and return them according to agreed deadlines marked up with our changes. Editors are available to discuss the changes with the analyst if required.

CLIENT DESCRIPTION	HEADQUARTERS LOCATION	SERVICES PROVIDED	CLIENT NEED	RESEARCH EDITORS SOLUTION
Investment banking arm of European universal bank	Spain	Supervisory analyst service	Full responsibility for supervisory analyst and editorial department. Supporting team of 50 analysts working in multiple time zones in Europe and Latin America. Coverage required on-demand 21 hours per day.	Four full-time supervisory analysts registered with FINRA by the bank in three time zones, one of whom also acts as research principal. Working inside client's IT environment.
Asset manager	Switzerland	Financial editing	Editing of up to 100 performance updates per month for marketing department. Supporting team of c200 investment professionals based in Geneva, London and New York. Turnaround of 24 hours required.	Team of four editors assigned in various time zones (Asia, South Africa, London).
Research and brokerage	USA	Financial editing	Editorial cover for a time-sensitive evening publication (NY time), augmenting capacity of team of in-house editors.	Dedicated editor, based in London, enabling review at end of NY day.
Investment advisory	China	Financial editing	Editing of China-focused research written by non-native speakers to ensure English is clear. On-demand daily coverage required at no set time for up to 50 hours per month.	Editing provided by various editors from our team, overseen by our Head of Editing.
Investment banking arm of European universal bank	Sweden	Supervisory analyst service	Supervisory analyst support for in-house team of three. Around 350 hours per month of coverage required, varying according to fluctuations in research volumes.	Team of five supervisory analysts registered with FINRA by the bank, working within client's IT environment using client-supplied laptops.
Investment banking arm of European national champion universal bank	France	Financial editing	On-demand editing of time-sensitive reports across all asset classes to support in-house team of 10 editors and supervisory analysts. Minimum 250 hours per month.	Dedicated team of three editors in multiple time zones all working inside client's IT environment (accessed via Citrix).

Why clients choose us

Quality

We have a large team of more than 25 experienced editors and supervisory analysts. They focus on what is being said and how it is being said, to ensure clarity, coherence and compliance. We adopt client-specific style and formatting requirements to preserve consistency across publications.

Reliability

We are a trusted business partner with client relationships lasting many years. We have a deep understanding of their requirements and provide a bespoke service. This means we can help our clients navigate the ever-changing business and regulatory environments.

Flexibility

We support clients in all regions and time zones. This includes planned, unplanned and 24/7 editorial coverage. We work remotely but can also integrate seamlessly with clients' in-house systems and onboarding and publication processes. We help manage editorial workflow peaks and troughs to ensure quality is maintained. Set shifts and ad hoc services at an hourly rate mean clients only pay for the services they need.

CLIENTS SERVED
55

TIME ZONES SERVED
13

ESTABLISHED SINCE
2010

Team

Hugh Farmar
CEO and Founder

Hugh founded Research Editors in 2010 to provide high-quality editing services to the financial services sector. Before founding the firm, Hugh worked for HSBC, Société Générale and Renaissance Capital as an editor and supervisory analyst. Hugh holds the FINRA Series 16 licence.

Helen Davies
Head of Supervisory Analyst Services

Helen leads the team of supervisory analysts at Research Editors. Before joining the firm, Helen was head of publishing at Macquarie Group, and an active editor/supervisory analyst. Helen has more than 25 years' experience editing investment research globally and holds the FINRA Series16 licence.

Ivanka van der Merwe
Head of Editing

Ivanka leads the editing team at Research Editors, overseeing the editing of a wide range of documents for clients. Before joining the firm, Ivanka was a senior editor at Redburn Partners. Ivanka holds an MSc in Philosophy from the London School of Economics.

Shane Lee
Chief Operating Officer

Shane oversees the business operations at Research Editors. Before joining the firm, he worked in senior finance roles for a number of multinational firms. Shane is a member of the Chartered Institute of Management Accountants.

Insights

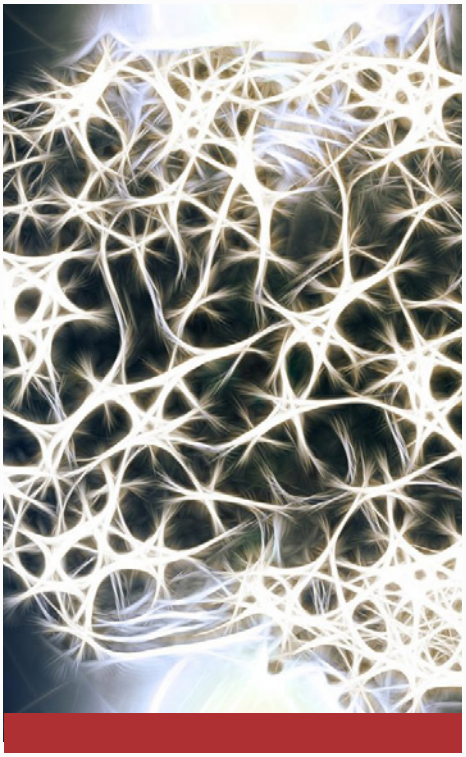
We regularly publish insights into the market on our website. Below are three samples from our work. To read the full versions and for more insights, please browse to researcheditors.co.uk/insights.

Does ChatGPT spell the end for the supervisory analyst?

In short, no, at least not this version. We tested ChatGPT 3.5 against FINRA's rules and the results were mixed. The best use for it - based on our current understanding and level of the technology - is as a tool similar to spellcheck, acting as a belt and braces check for the editor or SA.

What is the state of the SA market?

We sampled data for about 500 supervisory analysts around the world. We were interested in the distribution of ages, where SAs were based and what type of firm they worked for. We also wanted to know whether young SAs were coming up, whether lots of SAs were due to retire and if there was a shift towards hiring in Asia.



How editing eases cognitive strain

Our brains are like a cockpit, with dials indicating inputs to various variables. Am I under threat? Is anything new happening? Is more effort needed for this task? One of these dials measures cognitive ease on a range from “easy” to “strained”. If it points to easy that means things are fine; if it points to strained, there is a problem.

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