

Case Study: Commercial Due Diligence for a global PE Fund

Project Summary:

- A global Private Equity firm (based in US) wanted to enter the Canadian market by acquiring a regional insurance brokerage firm
- The client required commercial due diligence to accurately highlight the commercial viability of the targeted firm and the future of its operating market/ sector

Results Delivered:

- Assessed and developed market hypotheses for the current market scenario and implications drawn on the industry by mapping catalysts, driver trends and drawing upon primary / secondary research and internal analysis
- Outlined macro and micro economic shifts with potential to impact the target and industry
- Carried out an extensive assessment of carrier outlook on key broker-market dynamics
- Performed advanced analysis on the financial performances of key carriers and defined the current position of the firm in the market

Capabilities Demonstrated:

- ✓ Advanced market research and industry outlook assessment
- ✓ Target's Commercial Due diligence
- ✓ Competitive Benchmarking
- ✓ Voice of Customer

* Team credentials