

CASE STUDY

How CEM Benchmarking Achieved 167% Growth in Pension Research Capacity through AI-Powered Automation

Executive Summary

CEM Benchmarking is a data & insights firm that serves 150 of the world's top 300 pension plans. They have dramatically augmented their proprietary data sets with publicly available data through strategic implementation of Emerging Trajectories' AI platform. This partnership strengthens CEM's leadership in global pension benchmarking by efficiently allowing for public data in different geographies, languages and jurisdictions to be identified, sourced, cleaned and amalgamated.

Key results include:

- 167% increase in data throughput, expanding research capacity to more data sets, formats, and sources.
- Systematic data structuring to compare and analyze data from across multiple languages and reporting formats including websites, PDF reports, and databases.
- AI-powered analysis that matches or exceeds human experts in evaluating complex pension-focused metrics.

About CEM Benchmarking

CEM Benchmarking provides benchmarking services for investments and pension administration. They serve 150 of the world's 300 leading pension plans, providing objective insights to help fund sponsors optimize investment strategies and pension management. CEM offers services like investment benchmarking, pension administration benchmarking, and transparency benchmarking.

“ET increased our research capacity by 167%. We can analyze significantly more data, more primary sources, across more languages than before. This translates directly into deeper and more actionable insights for our clients.”

Rashay Jethalal
Chief Executive Officer
CEM Benchmarking

By automating the heavy lifting of data collection and preliminary analysis from public data sources, ET has unlocked new capabilities for CEM to augment how they perform high quality research and analysis.

Challenge

CEM Benchmarking is a leading provider of benchmarking services specializing in investments and pension administration, serving 150 of the world's 300 leading pension plans. In order to deliver best-in-class actionable research on pension plan investment performance and administration, CEM needs to overcome the following challenges:

- **Scale and Complexity:** Pension systems vary dramatically across jurisdictions, each with distinct reporting requirements and performance metrics.
- **Data Standardization:** Transforming complex pension data requires normalizing unstructured metrics, text, and other information from diverse data sources (e.g., annual reports, documents, websites) into actionable, comparable intelligence.

- **Multilingual Analysis:** Capturing nuanced information from annual reports, websites, and statements published in multiple languages and regions.

Finding a solution to automate CEM's data collection capabilities while maintaining analytical rigor was imperative to their continued growth.

Solution

CEM Benchmarking partnered with Emerging Trajectories to deploy the ET platform, focusing on three core capabilities:

Structured Data Frameworks

- Developed pension-specific taxonomies for classifying and comparing metrics, information, and text.
- Created automated scoring systems for evaluating the quality and accuracy of data classification and structuring.

On-demand Market Intelligence

- Deployed automated AI agents to monitor pension-focused websites and data bases.
- Perform granular, geography-specific research with local market context.

Multi-Source, Multilingual Analysis

- Automated analysis of pension data across multiple languages and jurisdictions worldwide.
- Monitoring of hyper-specific data sources, from reports and websites, to documents.

Results & Impact

"When going head-to-head against human researchers and data structuring teams, ET's structured data approach is as good as or better than human state of the art."

ET has transformed CEM's research operations by delivering human-level analytical quality at machine scale:

- **Expanded Coverage:** Automated monitoring capabilities to more data sources without additional analyst headcount.
- **Enhanced Depth:** High quality extraction of detailed metrics, text, and information from diverse data sets and formats via AI agents.
- **Improved Timeliness:** Reduced turnaround time for comprehensive and detailed oriented research.
- **Strategic Focus:** Freed analyst time from data collection and standardization to focus on delivering strategic insights and client enablement.

The partnership strengthens CEM's position as the authority on global pension analysis, transforming both the depth and accessibility of mission-critical intelligence. With ET, CEM's leaders can have greater focus on the strategic delivery of insights while AI systems handle the heavy lifting of public data collection, structuring, and preliminary analysis. This has unlocked the potential for AI to continue to shape CEM's business moving forward.

About Emerging Trajectories

Emerging Trajectories delivers personalized intelligence for enterprises. ET automates end-to-end intelligence monitoring & analysis using advanced AI and research agents.

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