

Consultancy

CBOLABS provides strategic and financial consultancy services to selected clients. The foundation for the advisory services is the findings and experiences from the R&D activities, and can involve:

- **Auditing of the Client's IM-operations:** The operations of financial asset management involves both a team of human resources and a financial strategy with information, analyses and ICT. The CBOLABS audit focus on the coherence of the operations as a whole and in relation to the stated financial objectives. Often, the audit includes a SWOT-analysis, leading to an action plan for improvements and increased performance.
- **Portfolio Model Evaluations:** The core of all IM-operations is the portfolio model that, first of all, defines what universe of trading and holding can be pursued and, secondly, defines how transactions are selected and on what algorithmic basis. CBOLABS performs evaluations of portfolio models and including recommendations for improved performance.
- **2nd Opinion Analyses – Corporate and Equity Valuations:** CBOLABS conducts valuations of corporations and public traded equity. The focus is on 2nd Opinions, where the added value to the client is an objective and/or alternative view.
- **2nd Opinion Analyses for M&A-transactions:** CBOLABS does not engage in full corporate finance services, but is available for 2nd Opinion analyses of potential and ongoing M&A transactions.
- **Strategic and Structural Position Analysis and BM-Recommendations:** Position and change-point analyses in terms of strategy and structure is a key output from the CBOLABS R&D activities. Such projects can involve advice to both directors and executives, as well as being part of management training and team-building programs.