

SILVERMONT CONSULTING GROUP

Outsourced Equity, Sector & Macro Research for Asset Managers and Boutique Funds

Silvermont provides institutional-grade equity research — initiation reports, financial models, and sector/macro analysis — for funds and asset managers who want sell-side-quality coverage without the cost of a full-time analyst. Engagements can be delivered white-label under your own name.

What You Get

- Full initiation-of-coverage reports: investment thesis, valuation (DCF + comps), and scenario analysis
- Complete 3-statement financial models (IS / BS / CF) built to institutional standard, not templated shortcuts
- Post-earnings and event-driven update notes on existing coverage
- Sector and macro research notes for thematic or top-down views
- White-label delivery available — work is invisible to your end investors

Why Silvermont

- Over 3 years of track record across equity research, report writing, and financial modeling
- Sector-agnostic coverage across 150+ companies over a two-year research tenure, including 50+ companies under full initiation-of-coverage (thesis, model, target price) and 100+ under lighter ongoing tracking
- Coverage specialization across Technology, IT, Real Estate, Infrastructure, FMCG, Defense, Banking, Financial Services and Insurance — with 20+ ideas identified that went on to deliver multiple-fold returns for investors
- Equity research track record: model portfolios delivering a 42% XIRR over 18 months, built on DCF and comparable company analysis

See the Work

A full sample initiation-of-coverage package — written thesis, valuation, and the underlying financial model — is available on request or as a direct download from silvermontconsulting.com/track_a/work_sample. It reflects the same depth and format used in every Silvermont engagement.

Let's talk about your coverage needs.

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