
Service

Economic and Financial Expert Services

Economic and financial modeling for questions that depend on projections, scenario comparisons and the choice of rates and indices.

When the value depends on assumptions, every assumption has to be defended.

What a revenue stream was worth, what a delay cost, which rate properly remunerates capital, what scenario would have existed without the event in dispute. SGEx answers these questions by separating observed data from assumptions and showing how much the result changes when each assumption changes.

When clients call on SGEx

Claims for loss of profits and lost revenue.

Economic and financial imbalance in long-term contracts.

Arbitration with damages based on projections.

Disputes over interest, inflation adjustment and financial charges.

Economic impact of termination, default or regulatory change.

How SGEx works

Data and assumptions kept apart

What was observed in the records is never confused with what was projected.

Explicit sensitivity

Every relevant assumption is tested, and its effect on the final value is visible.

Reproducible models

Models, ours and third parties', examined for logic, sources and reproducibility.

Small changes in rates, margins or timing move significant amounts. That is why none of them is left implicit.

What We Solve

Questions that call for economic modeling.

What would have happened without the event?

Building the counterfactual and the link between the event and its economic effect.

Are the projections consistent with history?

Testing revenue, cost, margin and timing assumptions against available data.

Which rate and which index apply?

Discount rates, adjustment indices and interest and charge criteria.

How much does the result depend on each assumption?

Sensitivity analysis of the variables that move the value the most.

Is anything counted twice?

Checking for overlap between heads of claim.

Does the other side's model hold up?

Critical review of models and quantum reports.

How We Approach It

Steps applied to this type of engagement.

1
Economic question

Defining what must be measured and as of which date.

2
Observed data

Gathering the history and the source of each variable.

3
Model

Building or reviewing the model with documented assumptions.

4
Sensitivity

Testing the conclusions against the relevant assumptions.

What we examine: financial statements and financial history, contracts, budgets and projections, price series, indices and rates, and models submitted by the parties.

Deliverables: economic and financial opinion, expert report, documented quantification model, sensitivity analysis and critical review of models and quantum reports.

Related Topics

More on each topic at sgexpericias.com.br

Services

Disputes and Litigation Support
Arbitration
Business and Asset Valuation
Accounting Expert Services

Specialties

Damages and Loss of Profits
Shareholder Disputes and Valuation
Commercial and Contract Disputes
Construction and Infrastructure
Tax and Tax Enforcement

Areas of Law

Civil and Contract Law
Corporate and Commercial
Administrative and Regulatory
Mergers and Acquisitions
Family, Estates and Succession

Industries

Construction, Engineering and Infrastructure
Insurance and Reinsurance
Financial Services and Capital Markets
Technology and Telecommunications
Hospitality and Real Estate

SGEx at a Glance

Figures reported by SGEx, updated periodically.

400+

engagements completed

100+

court cases in progress

300+

clients served

200+

law firms served

500+

reports, expert reports and opinions delivered

BRL 100M+

in fraud and irregularities identified

Proven Results

Client and party names withheld.

Fraud Investigations

BRL 80M

in irregular transactions identified in an investment fund that became insolvent. With limited documentation available, SGEx built the technical case for access to the bank statements of the companies under investigation; the court-appointed expert validated the amounts.

Economic and Financial Expert Services

+150%

increase in the amount owed to a shareholder in judgment enforcement, more than BRL 20 million above the figure presented. SGEx compared public tender contracts with declared profits and guided the court-appointed expert's inquiries.

Who Leads the Work

Accounting, economics and corporate finance.



Sidney Gomes

Founder and Managing Partner of SGEx Group

Economist and accountant. Works on loss of profits, economic and financial rebalancing of contracts and concessions, banking disputes and quantification of judgments.



Marco Bole

Managing Partner, Advisory and Finance

Business administrator (CRA-SP). Works on corporate finance, valuation and due diligence; former Budget and Finance Specialist at Astellas Pharma.



Fabricio Franco

Operations Coordinator and Senior Expert, Disputes, Investigations and Forensic Services

Accounting expert (CNPJ-CFC no. 8116) specializing in loss of profits and direct losses in court and out-of-court matters, as well as business valuation.

Request an Assessment

Describe the amount in dispute, the assumptions involved and the documents available. SGEx will assess the scope of the analysis before submitting any proposal.

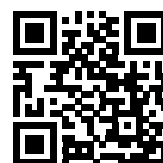
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