

3. Portfolio management: Turning data into actionable intelligence

 **Monthly and quarterly reporting packs** prepared using standardized templates and formats

 **Consolidated KPI dashboards** providing visibility across multiple portfolio companies

 **Variance and bridge analysis** highlighting key performance drivers and trends

 **Covenant monitoring and performance tracking** for timely issue identification

 **Benchmarking and peer comparison analysis** for continuous portfolio optimization

 Portfolio companies with standardized KPI tracking show 25% faster identification of performance issues and 35% improvement in response time

1

Unified portfolio view

Consolidates financial and operational KPIs across companies, enabling a single source for fund managers

2

Performance intelligence

Variance analyses uncover drivers of revenue, margin, and cash flow shifts. Trend analysis enables strategic decisions

3

Covenant & Control tracking

Automated checks on leverage, coverage, and liquidity covenants with alerts for potential breaches or deviations

4

Peer benchmarking framework

Compares portfolio company performance against sector peers and fund benchmarks to identify improvement levers