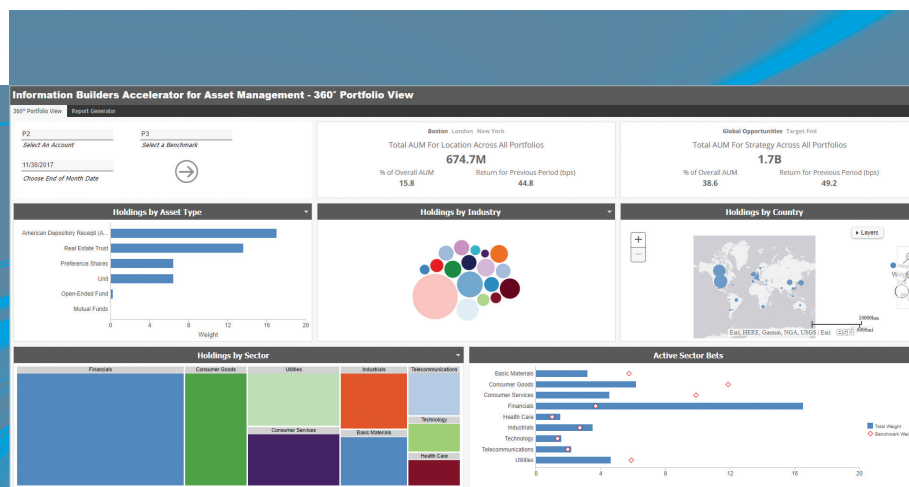


Accelerator for Asset Management: Portfolio Outlook

Executive Dashboard for Analyzing Portfolio Holdings and Investments



The Accelerator for Asset Management: Portfolio Outlook provides key metrics for monitoring firm-wide composition, risk, and return of portfolios by sectors and regions, as well as active bets.

In Partnership With



An Accelerator is a set of pre-configured analytical capabilities designed for specific users in an industry. It provides a jump-start to extend and personalize these capabilities using the full power of the Information Builders data and analytics platform.

Get Started Now

Contact us to try it with your own data.

The **Accelerator for Asset Management: Portfolio Outlook**, delivered in partnership from Kuberre and Information Builders, empowers asset managers and owners with visibility into composition by sectors and regions. It also delivers insight into active bets relative to benchmark, with comprehensive security analytics. Pre-built content includes an executive dashboard, data description, and sample data for key metrics and analysis, as well as a report generator to enable non-technical users to create their own dashboards and tabular reports.

Key Performance Indicators

- Assets under management (AUM) by strategy, region, sector, and security type
- Active bets relative to benchmarks
- Map portfolio holdings to market data consisting of comprehensive security characteristics
- AUM geolocation and asset distribution

Business Benefits

This accelerator replaces manual Excel-based processes, giving organizations greater visibility into client activity, investments, and opportunities. Asset managers and owners can assess and visualize risk for a single portfolio or across multiple portfolios, as well as investigate what-if scenarios. It also lays the foundation for obtaining a single version of the truth, and the creation of C-suite-ready reports, even as financial instruments grow in complexity and the number of data sources increases. And because it offers pre-built content, the accelerator can be up and running in less than two weeks.

Find Out More

We can help you succeed.

Talk to your local Information Builders representative to learn how.

Visit us at **informationbuilders.com**, e-mail **askinfo@informationbuilders.com**,

or call **(800) 969-4636** in the U.S. and Canada. To improve your skills,

visit **education.ibi.com**.

Corporate Headquarters

Two Penn Plaza
New York, NY 10121-2898
(212) 736-4433
(800) 969-4636



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informationbuilders.com

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