



## Background

Inconsistent reporting from direct investment portfolio

Increased risk due to economic and financial market volatility

Scarce resources available to team



## Solution

### Portfolio Management

Receive automated monthly updates from direct investments

Receive on-demand IR Releases with corporate actions

### Fund Governance

Dashboard to monitor tasks

Document Library to save critical data

Secure collaboration with lawyers and auditors



## Benefits

Enhanced visibility on portfolio performance and issues

Ability to enforce shareholder rights

Analyst team time saving

Reduced operational risk in data management and communication