

Portfolio Management

Your investment intelligence platform for your portfolio operations.



Optimize portfolio outcomes with 360-degree visibility

Quickly understand portfolio performance and impact. Optimize your portfolio outcomes and manage rapid growth with a scalable platform.



Drive change with data by having the right data at your fingertips to improve outcomes



Scale with confidence with automated portfolio operations, KPI tracking, and auto generated reports



Lower your operational costs with improved efficiency



Maximize liquidity with ultimate transparency on asset and portfolio performance

Standardized Metrics and Live Performance Data

Real-time, actionable insights that improve profitability and maximize liquidity

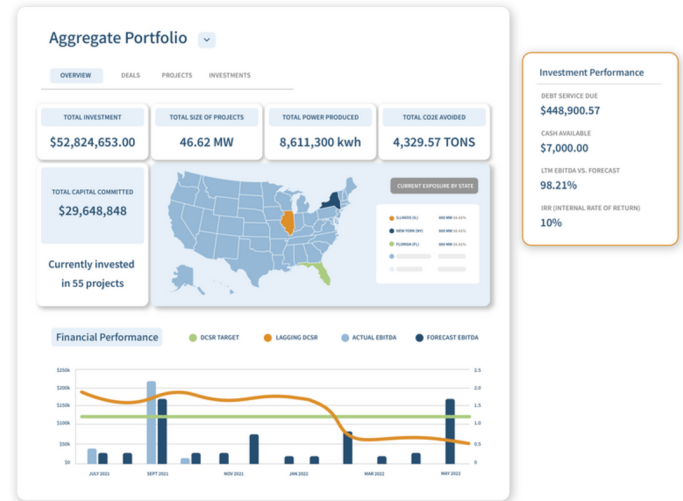
- Track in real-time metrics that are unique to project finance.
- Automatic calculations of Financial Metrics (IRR, DCSR, 30+ more)
- Asset Performance metrics (kWh, MW, and more)
- Impact metrics (CO2 Avoided, Affordable Housing Units Upgraded, Projects Financed in Disadvantaged Communities, and more)



Roll Up or Drill Down

A comprehensive view of your portfolio, at the highest level or as granular as you need

- Portfolio roll-ups allow you to see relevant data and give you the flexibility to drill down if needed
- Understand the areas of your business that need attention. Quickly triage your team to manage performance and risk better
- Have answers and insights at your fingertips, 24/7



Proactively Manage Risk

De-risk your portfolio with always-on monitoring and alerts

- Automate insights, and set alerts for performance and unmet KPI thresholds
- Set thresholds for alerts on underperformance
- Quickly manage underperformance, and drill into key deal and portfolio details
- Minimize downside with rapid triage and risk reduction

Reporting with Ease

Save countless hours with instantly generated reports

- Instantly generate and share live reports on portfolio performance against forecasts, budgets, and other key social and environmental metrics.
- Save time on tedious and manual reporting.
- Always be able to answer questions and requests about deals and portfolio performance.

