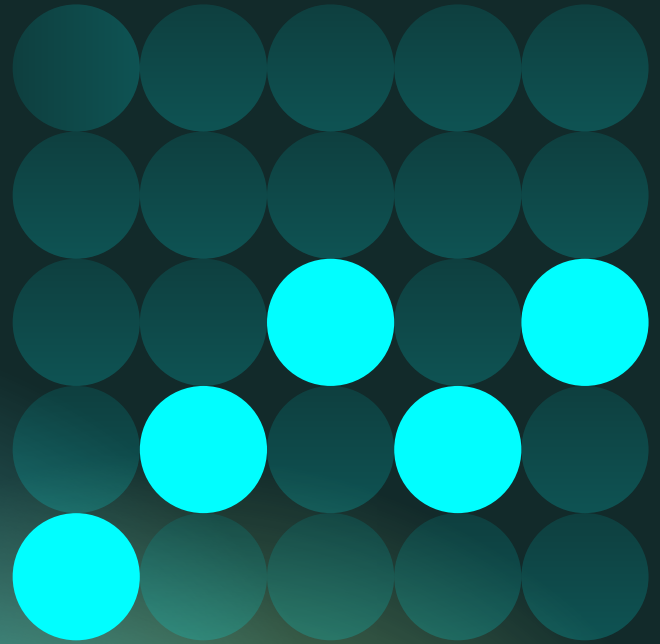


Portfolio monitoring

A comprehensive investment review service that provides you with actionable insights on every portfolio.



PORTFOLIO MONITORING DESIGNED TO MANAGE RISK

Investment manager reports can be complicated and confusing. Monitor levels the playing field.

Monitor delivers crystal-clear, quarterly investment reviews which independently assess each portfolio against its mandate and appropriate benchmarks. Portfolio reviews can be consolidated to provide client and practice-level actionable insights that help you manage your investment responsibilities.

MONITORING AT A GLANCE

\$50bn+

Assets under reporting

800+

Investment managers

7,000+

Accounts on platform

REVIEW TYPES



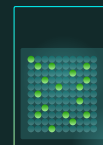
PORTFOLIO

Portfolio reviews focus on individual mandates and form the building blocks for client reviews.



CLIENT

Client reviews aggregate multiple portfolios into a consolidated review of all investments held.



PRACTICE

Practice reviews aggregate all portfolios and clients into global management information.

Monitoring that connects the investment dots

Enhance rating

A 1-5 Enhance rating is calculated against the portfolio's primary benchmark to summarise the risk-adjusted performance against the most relevant measure.

Benchmarked stats

The returns and risks of each portfolio are compared against a range of appropriate independent benchmarks over different timeframes to ensure fair appraisal.

Allocation X-rays

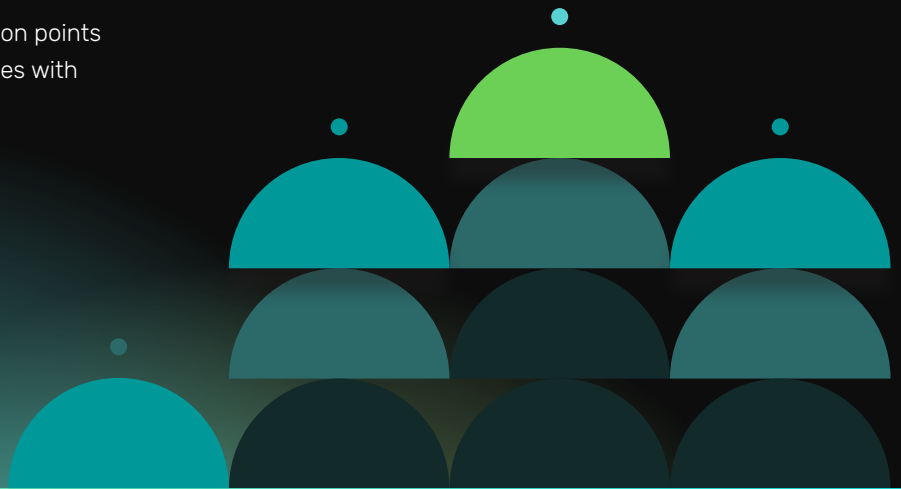
Portfolio holdings are X-rayed to help establish the source of returns and risks and confirm whether the investment manager is operating within their mandate.

Mandate compliance

Each portfolio review includes mandate compliance checks, which identify whether the portfolio is compliant with its mandate and suitable investment policy parameters.

Action points

Suitability, technical and administration action points are provided to help you resolve arising issues with investment managers.



Next steps



The next step is for Enhance to provide a personalised presentation to introduce our Monitor service.

Get in touch

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