

PORT <GO>

Private Equity + PORT Integration

Bloomberg's Portfolio & Risk Analytics solution helps portfolio managers achieve their objectives by providing unmatched transparency into their portfolio's performance, characteristics, risk and more. Today, clients can integrate their Private Equity (PE) investments alongside public market exposures for a unified, multi-asset view within PORT. Using the new Private Equity Risk Factor model, users can then quantify risk by PE-specific factors such as fund size, momentum of cash flows and the age of their fund investments.

PE + PORT allows for 3 things:

1. Integrating Private Equity fund investments in PORT
2. Creating customized "what-if" Private Equity portfolios in PORT
3. Utilizing Bloomberg's publicly available Institutional Investor data to assess risk and exposure

What are the benefits of Private Equity + PORT integration?

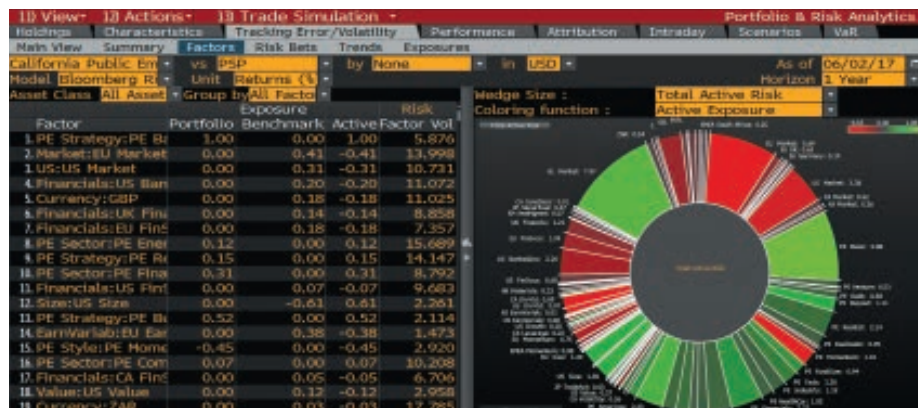
Through one upload, your Private Equity fund holdings are seamlessly integrated throughout Bloomberg's PE-specific functionality, as well as PORT. This allows for more robust analytics (e.g., benchmarks, fund comparisons, fund profiles, etc.), alongside a full suite of portfolio analytics.

Once your data has been privately integrated you can analyze the performance of your multi-asset portfolio on an absolute basis or relative to a benchmark and identify the sources of your portfolio's absolute or excess return by asset class, sector, geographic region, a custom classification or utilizing Bloomberg's multi-factor risk model(s).



The recent Bloomberg Private Equity/PE + PORT enhancements include:

- New factor-based Private Equity Risk Model to quantify risk and exposure
- Alerts on the deals, news and other impactful changes within your PE portfolio
- Benchmarking over time to analyze how the Private Equity market has performed in aggregate



Take the next step.

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