



IVORY
Portfolio Intelligence

Portfolio Intelligence

Optimize Portfolio Profitability



UNDERSTAND YOUR PORTFOLIO

Manage risk by understanding portfolio concentrations and attributes`



VISUALIZE PROFITABILITY

Optimize profitability by utilizing easy-to-use analytics and visual segmentation tools



FORECAST ANY OUTCOME

Accurately prepare for any future eventuality by identifying historical trends and extrapolating insights



RESPOND TO GLOBAL OCCURRENCES

Quickly process portfolio-wide modifications

Portfolio Intelligence makes analyzing lease and loan portfolios insightful.

PERFORM COMPREHENSIVE PORTFOLIO ANALYSIS

Measure portfolio profitability by segment, customer, financial product, credit, channel, geography or sales professional across all transactions.

Create multiple portfolios for analysis and evaluate individual transactions, segments of a portfolio or an entire portfolio.

RUN "WHAT-IF" SCENARIOS

Use "what-if" scenarios to better understand and manage risk factors.

Modify existing transactions by altering assumptions and watch income, tax deferrals and yields dynamically change on the dashboard.

STRUCTURE BUY-SELL TRANSACTIONS

Syndicate all or part of a portfolio for sale or evaluate a portfolio for purchase in a matter of minutes with advanced syndication tools.

Identify deals that meet your buying and selling criteria using extensive analytical options — static pool analyses, sensitivity analyses and "what-if" scenarios — delivered via dashboards and shareable reports.

CUSTOMERS THAT TRUST US

- Altec Capital Services
- Bank of America
- Fifth Third Bank
- Flagstar Bank
- Siemens
- Stonebriar
- Truist Bank

TESTIMONIAL

"Portfolio Intelligence has helped us to manage and analyze profitability and contribution data across segments, regions and verticals. It has become a key tool for management and in making strategic investment decisions."

– Keith Moore
Senior Vice President
Truist Bank