Transform raw business performance data into actionable insight

Meet FlowPoint, your partner in escaping the data abyss

You need transparency to effectively manage risk across your portfolio holdings, but costly manual workflows make it challenging to:

- Collect fund performance data in a standardized, scalable way.
- Keep this data consistently organized over time and ready to meet any analysis or regulatory need.
- Spot leading indicators of risk in near-real time and take corrective action.

These challenges force skilled portfolio managers to prioritize the mechanics of reporting and monitoring.

FlowPoint's collaboration hub lets you instantly leverage:

Automated reporting processes	Analytics dashboards	Near real-time alerts

1. Standardize and scale your data collection and reporting workflows, creating early warning systems
2. Spend more time on risk analysis and less on operational data management
3. Improve clarity and simplicity around the reporting experience to build stronger relationships.
4. Generate a secure, standardized, time-series data room that provides a shared source of truth and performance insight for you and the companies in your portfolio.

We deliver results

+90% compliance in loan reporting

☆☆☆☆☆ borrower experience

Materially reduce your loan monitoring time

Let easy, transparent access to your business performance data unlock your competitive advantage

download our resources

Core Reporting Features

Visualize and monitor your portfolio's reporting health

Stay on top of your compliance requirements and proactively manage risks as they evolve with less effort. Learn from your data and share results to deepen conversations and build stronger relationships with the external fund managers in your portfolio.

Collect key performance metrics

Capture performance metrics that matter most to you through standardized, customizable FlowPoint forms. You can quickly, easily, and regularly capture reporting data for analysis and risk management. Build up a time series data base of your fund's key performance indicators that are important to your firm, and track their trends in near real-time.

Transparently collaborate with your clients

Effectively communicate reporting requirements and your expected cadence, ensuring both sides understand exactly what's needed and when. Capture your digital conversations and clarifications, along with reporting data, for improved auditability and faster resolution. Be more transparent and give real-time submission notifications and viewing access to all documents, data and discourse submitted by your fund company partners.

It's also easier to share context across your team when your confidential discussions are safely captured in one centralized place.

Centralize business performance reporting

It takes minutes to structure and schedule all your compliance documents and data request needs through our platform. Automate your reporting reminders and collection workflows, keeping your team focused on the challenging aspects of your business until it's time for analysis.

Organize compliance consistently over time

Our unique data room is consistently organized and easy to search, preview, download, and share for collaboration. With consistent categories across your portfolio, the FlowPoint data room will help you to meet any analysis or regulatory need. Your submitted data is time stamped, standardized, and logged, drastically reducing any potential for miscommunication, version ambiguity and litigation between your firm and its external investment partners.

Ready to learn more?

Get in touch for a demo.

info@flowpoint.co | flowpoint.co

FlowPoint