

## CASE STUDY

# Transforming Portfolio Intelligence

## How a \$100B+ EMEA Asset Manager Scaled Decision-Making with CEPRES

### Challenge



The asset manager struggled to obtain consistent, timely, and standardized data from portfolio companies, limiting their ability to generate reliable analytics. Investment teams lacked agility, and fund operations were burdened by manual reporting. Slow board reporting and limited performance visibility increased pressure to modernize the data model across investor, portfolio, vehicle, and look-through company levels.

### Solution



The asset manager partnered with CEPRES to implement an end-to-end platform supporting benchmarking, due diligence, portfolio monitoring, automated data ingestion, and forecasting. Market Data, analytics, dashboards, and predictive tools enabled faster evaluation, standardized reporting, and real-time oversight. The platform integrated seamlessly into existing workflows, improving efficiency and decision-making across 500+ assets for greater operational clarity.

### Results



#### ✓ FASTER REPORTING

Reporting time dropped over 60%, data collection effort halved, and teams delivered board materials faster with automated, consistent reporting workflows.

#### ✓ UNIFIED DATA

Unified access to operating data across 500+ portfolio companies increased transparency, improved consistency, and strengthened the accuracy of organizational insights.

#### ✓ STRONGER DECISIONS

Faster analysis, stronger data foundations, and improved forecasting enabled more confident investment decisions and enhanced risk management across the portfolio.



# ABOUT CEPRES

FOR OVER 20 YEARS

CEPRES has served the **world's most influential private markets investors** by providing them with high quality, granular, private market deal data and world-class portfolio management tools.

Our clients leverage proprietary deal data and complete cash flows from the world's largest private markets ecosystem containing more than **\$56T in assets, 143,000+ PE-backed companies, 16,500+ funds, and 6,000 GPs and LPs.**

CEPRES' investment data platform is powered by **real-time and predictive analytics** so clients can unlock better investment outcomes and make smarter decisions.

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