

# Achieve Mission Objectives with PFaroe™ E&F

## GAIN INSIGHT FOR OPTIMIZED PERFORMANCE, REDUCED RISK, AND BETTER SOLUTIONS

PFaroe E&F is a modern technology solution that simplifies and automates complex processes, across both the public and private investment instruments typically held by E&Fs. Built by industry experts to meet the unique needs of Endowments and Foundations (E&Fs), Outsourced Chief Investment Officers (OCIOs), and asset managers, this comprehensive platform provides transparency and helps capitalize on market opportunities — all while delivering operational efficiencies, improving governance, and achieving optimized mission delivery.

### GET VITAL DATA AT A GLANCE

Covering daily portfolio value, cashflow projections, spending forecasting and more, PFaroe E&F puts critical information right at your fingertips. Top tools include:



**Dashboard:** Get quick insight into daily portfolio value history, key market stress scenarios, portfolio value at risk (VaR), and more.



**Forecast spending and test alternative asset allocations:** Test and implement investment strategies with customized spending studies. Model and maintain custom asset classes including private market assets.



**Reporting:** Automate the production of routine investment reporting.



**Asset Insights:** Monitor portfolio holdings and assess the impact of changing market conditions. Perform cash flow projections and stress testing.



**Risk Analysis:** Analyze risk attributes and align the investment portfolio with risk and return objectives.

### LEVERAGE POWERFUL ANALYTICS

PFaroe E&F empowers E&Fs, OCIOs, and asset managers to respond more effectively to changing market conditions, speeding up reporting cycles, and avoiding costly mistakes. With a user-friendly interface and sophisticated functionality, this solution delivers a host of powerful benefits.

#### Take Advantage of Greater Visibility

Use time-tested analytical tools and industry-leading insights to make better, faster, more informed decisions. Increased visibility provides critical context to all stakeholders for better collaboration.

#### Increase Efficiency and Productivity

Improve response times, automate reporting, and perform seamless monitoring tasks that put the focus on action, not number generation.

## Capitalize on Market Opportunities

Leverage analytics designed for the unique needs of E&F's. Access timely data that identifies opportunities using real-time analysis. Improve response times to limit delays and possible losses.

## Improve Governance and Mission Delivery

E&Fs will find that this solution scales to meet changing needs, goals, and market conditions. That means better utilization of IT budgets, improved governance through streamlined processes and access to better analytics over in-house models.

## Win More Business

OCIOs and asset managers can use this purpose-built tool to leverage metrics and reports that boost client engagement. Better insights support recommendations and enables more effective communication, better portfolio solutions, and streamlined reporting.

<b>ACHIEVE BETTER OUTCOMES*</b>	<b>Endowments &amp; Foundations</b>	<b>OCIO'S*</b>	<b>Asset Managers</b>
Monitor solution effectiveness	✓	✓	✓
More efficient client reporting		✓	✓
Scale your operations	✓	✓	✓
Capitalize on market opportunities	✓	✓	✓
Improve client response times		✓	✓
Automate tailored reporting	✓	✓	✓
Eliminate obsolete systems	✓	✓	✓
Structure better solutions	✓	✓	✓
Demonstrate holistic risk expertise	✓	✓	✓
Test **portfolios from multiple perspectives	✓	✓	✓
Optimize performance to risk targets	✓	✓	✓
Create more impressive pitches		✓	✓
Demonstrate strategic value		✓	✓
Manage portfolio growth to spending targets	✓	✓	✓
Reduce errors/eliminate manual processes	✓	✓	✓
Reduce key person risk	✓	✓	✓

\*OCIO's means Outsourced Chief Investment Officers

\*\*Portfolios refers to investment portfolios

## CONTACT DETAILS

PFaroe provides a modern technology solution to Asset Owners, Asset Managers and Consultants. Come join the PFaroe family and keep company with some of the industry's biggest names. To learn more, go to <https://pfaroe.moodyanalytics.com>