

## Case study

### Transforming portfolio surveillance: Accelerated portfolio monitoring and reporting for 300+ investment cases

#### About the client



A leading US-based diversified asset manager with exposure to private assets required support on portfolio surveillance.

#### Client challenges



- Client teams spent excessive time on surveillance, limiting focus on new deals
- Lack of standardization across deals caused inefficiencies for portfolio managers, risk and finance teams
- Backlog of 300+ investment cases with no real-time coverage

#### Our solution



Crisil team:

- Took over end-to-end production of 300+ two-pager credit summaries for portfolio and executive management reporting
- Was a single point of contact for internal and external reporting requests
- Delivered consistent, insight-rich summaries for monthly and quarterly reviews, enabling better cross-team access
- Maintained a live database as a central reporting hub, reducing turnaround time and enabling real-time access
- Provided regular financial performance inputs to valuation teams internally and externally, for accurate quarterly assessments

#### Impact and results



##### 300+

Cases cleared and standardized for portfolio and executive reporting

##### Centralization

Established a single point of contact for internal and external reporting, streamlining requests and improving response time

##### 100%

Coverage of monthly and quarterly surveillance cycles with consistent, high-quality outputs

### **About Crisil Integral IQ (formerly Global Research & Risk Solutions)**

Crisil Integral IQ delivers solutions and actionable intelligence to top financial institutions, driving strategic transformation, risk optimization, and operational excellence. Our offerings across research, risk, lending, analytics and operations have empowered clients to navigate complex markets, mitigate risks and unlock new opportunities. Our domain expertise, innovative solutions, future-ready technologies such as AI and data science give clients the confidence to accelerate growth and achieve sustainable competitive advantage. Our globally diverse workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East.

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### **About Crisil**

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Large and highly respected firms partner with us for the most reliable opinions on risk in India, and for uncovering powerful insights and turning risks into opportunities globally. We are integral to multiplying their opportunities and success.

Headquartered in India, Crisil is majority owned by S&P Global.

Founded in 1987 as India's first credit rating agency, our expertise today extends across businesses: Crisil Ratings, Crisil Intelligence, Crisil Coalition Greenwich and Crisil Integral IQ.

Crisil's global workforce operates in the Americas, Asia-Pacific, Europe, Australia and the Middle East, setting the standards by which industries are measured.

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