

13th Private Equity New York Forum

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Private markets solutions



Crisil Integral IQ offers end-to-end collaborative solutions to asset managers across private market workstreams



We help optimize workflows with domain-driven bespoke solutions, providing improved operational efficiencies and better Rol

Why Crisil



An affiliate of **S&P Global**



20+ years of experience in collaborating with global asset managers



Domain excellence across asset classes



Employer of choice status enables rapid scale-up of any solution

Who we serve

- 50+** private equity and venture capital managers
- 20+** private and alternative credit managers
- 10+** real estate and infrastructure managers

Our solutions

- Our bespoke solutions allow private asset managers to focus on new investment opportunities, value creation, and investor engagement, while streamlining operations and reducing costs
- We have deep expertise in private market workflows across asset classes, including:

Private equity

- + Venture capital
- + Growth equity
- + Leveraged buyouts
- + Secondaries

Private credit

- + Direct lending
- + Unitranche
- + Mezzanine
- + Distressed debt and special situations

Real assets

- + Real estate (core/ value-add/ opportunistic)
- + Infrastructure

Specialty finance

- + Asset-backed finance
- + NAV lending

Post-deal support



Valuations

- Valuations for private equity, private credit, real assets
- Monthly/quarterly refresh
- Audit support
- Corporate and LP reporting through dashboards



Reporting

- Compliance reporting
- Regulatory reporting
- Fund performance reports
- Portfolio analytics
- Risk monitoring and reporting



Portfolio surveillance

- Covenant compliance tracking
- Quarterly management calls support
- Portfolio performance dashboards
- Early warning signals
- Portfolio insights generation



Data operations

- Financial spreading and updates
- iLevel and other system/platform feeds management
- Custom dashboard creation
- Data quality management

Benefits

 Proven expertise in workflow optimization

 Bespoke solutions to meet unique needs

 Scalability to meet peak-time support

 Ownership-driven project delivery

 Effective regulatory compliance

 Significant cost savings

By the numbers

1,500+ analysts across seniority and experience

500+ live deals supported

10,000+ KPIs tracked quarterly

4,500+ financial models and memos updated quarterly

6,500+ portfolio valuations quarterly

3,500+ portfolios live shadow accounting

250+ funds LP fund memo and performance reporting

1,750+ investment data transitioned to cloud-based platform

150+ funds RFP and DDQ support

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