

Driving Capital Planning Through Real-Time Portfolio Visibility

Case Study

Business Impact

2X

faster decision-making on asset hold/sell scenarios

53% ↓

in delays across capital committee cycles

74%

improvement in risk-weighted allocation precision

2X

more frequent scenario reviews triggered

Problem Statement

The client's finance and investment teams were unable to efficiently assess risk and return trade-offs at an asset level. Portfolio-level models lacked drill-down capabilities and weren't scalable to asset-wide views. As a result, capital planning decisions (like reinvestment, divestment, or refinancing) were delayed or based on outdated data, especially when interest rate or occupancy assumptions changed.

Solution Overview

- Consolidated 70+ asset-level valuation models into a central portfolio environment with hierarchical grouping by asset type, region, and fund.
- Built dynamic dashboards that provided real-time calculations of NAV, MOIC, IRR, and yield on cost (NOI), segmented by capital strategy priorities.
- Developed a capital strategy toolkit that linked valuation data with hold-sell thresholds, refinancing triggers, and reinvestment recommendations.
- Embedded real-time scenario toggles for macroeconomic drivers (e.g., interest rates, market cap rate shifts) with immediate impact previews.
- Integrated decision workflows allowing users to flag high-risk or underperforming assets for review, divestment, or restructuring.
- Enabled capital allocation recommendation packs aligned with investment committee KPIs.
- Facilitated ongoing alignment between asset managers, finance leaders, and the investment office with shared views and action notes.