

## CLIENT

NEW MEXICO  
FINANCE **AUTHORITY**

## OVERVIEW

New Mexico Finance Authority (NMFA) needed an investment accounting solution that could provide transparency, consolidation, and accurate accounting. They also wanted a more efficient way to deliver performance reports for clients and proactively monitor compliance.

Clearwater's custom reports and automated data aggregation streamline NMFA's investment accounting processes, providing both in-depth and high-level portfolio views for complete transparency. Clearwater's fully integrated custody bank feeds provide real-time data so NMFA no longer has to wait for external reports from trustees. Additionally, Clearwater's compliance reports enable NMFA to monitor their portfolio closely to ensure they are always within their investment guideline parameters.

## GOVERNMENT PROFILE

## INDUSTRY

- Government

## PORTFOLIO

- \$600 million +
- U.S. government debt, money market funds, and more

## REASONS FOR CHOOSING CLEARWATER

- ✓ Integration with custody banks enables full aggregated view of portfolio
- ✓ Transparent and accurate daily reporting for key stakeholders
- ✓ Best-in-class compliance and performance reporting
- ✓ Dedicated, knowledgeable client services team providing unlimited support

“Clearwater is a great solution for government entities. The system has so many resources for us to put together custom reports for anyone who needs them so we can maintain complete transparency. Compliance and performance are easy to monitor, which our stakeholders absolutely love. I have nothing but good things to say about Clearwater.”

**Mark Lovato***Investment Manager  
New Mexico Finance Authority*Custom Reporting for Portfolio  
TransparencyTO LEARN MORE, PLEASE CONTACT US AT  
**208-918-2400 OR [SALES@CLEARWATERANALYTICS.COM](mailto:SALES@CLEARWATERANALYTICS.COM)**