

CLIENT



OVERVIEW

The City of Newport Beach struggled to monitor their portfolio risk exposures and effectively analyze their investment strategies. Grappling with the complex investment oversights of a government entity, the city needed deeper insight into their portfolios for trend tracking, compliance monitoring, and performance benchmarking.

Clearwater gives The City of Newport Beach the tools they need to efficiently oversee their complex portfolio strategies. Clearwater provides the city with an independent check on its investment advisor activity, market value, and portfolio status at any time. Automated compliance notifications gives the city full portfolio visibility and risk awareness, and helps ensure conformity within their complex government regulations. Clearwater's customizable reports have streamlined the city's reporting, so that tasks that previously took a day or more are now completed in less than an hour.

GOVERNMENT PROFILE

INDUSTRY

- Government

PORTFOLIO

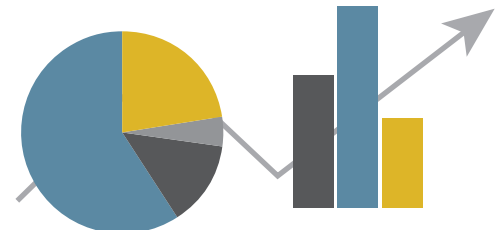
- \$171 million +
- Corporations, agencies, and US government

REASONS FOR CHOOSING CLEARWATER

- ✓ Automated data aggregation and reconciliation for in-depth portfolio analysis and risk visibility
- ✓ Increased efficiency, giving staff more time to focus on high-level tasks
- ✓ Full compliance views to ensure they stay within government investment guidelines
- ✓ Improved investment benchmarking and communication with investment advisors

“Clearwater is an outstanding product that I emphatically endorse, and I highly recommend it to anyone considering a switch. Many software companies promise they're going to bring efficiencies to your organization. Clearwater actually delivers on that promise. Clearwater greatly enhances our ability to take care of our fiduciary responsibilities.”

Dan Matusiewicz
Finance Director/Treasurer
The City of Newport Beach



Improved Benchmarking Capabilities Directly Leading to Excess Earnings Against Benchmarks

TO LEARN MORE, PLEASE CONTACT US AT
208-918-2252 OR SALES@CLEARWATERANALYTICS.COM