



+ Enhance

Delivering clarity

INDEPENDENT INVESTMENT MONITORING USING DATA YOU CAN TRUST

The world of financial services is unpredictable and often opaque.

Our Monitoring solution delivers clarity to fiduciary investors, harnessing our custom-built Mosaic technology to transform complex financial data into understandable portfolio review reports, interactive dashboards and workflow tools.

Investment governance, simplified.

ASSETS UNDER MONITORING

\$50bn+

Assets under reporting

800+

Investment manager universe

9,000+

Portfolios

INSIGHTS AT EVERY LEVEL

Portfolio level monitoring

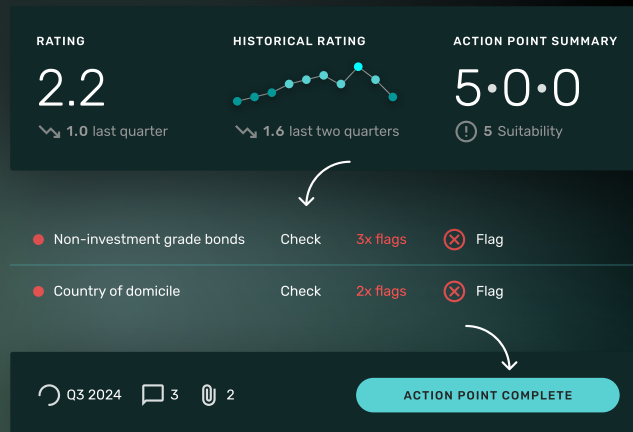
Mosaic provides a range of portfolio level report options, all of which employ our Enhance Manager Analysis Programme framework. EMAPs are the building blocks for all our investment monitoring.

Client level monitoring

Where a client has multiple investment portfolios, our Consolidated Portfolio Analysis Review will aggregate our portfolio level monitoring into a single client-level view.

Practice level monitoring

All EMAPs and CPARs are consolidated by Mosaic into Management Information Reports, interactive dashboards and workflow tools to create a comprehensive investment governance framework.



ENHANCE RATING

Objective scrutiny

Mosaic calculates an Enhance Rating for every portfolio we monitor. Our proprietary algorithm delivers a simple 1 to 5 score for each review period. Ratings are tracked over time to assess the investment manager in delivering against the benchmark.

MANDATE COMPLIANCE

X-ray vision

Mosaic x-rays the holdings of each portfolio and identifies if it is compliant with suitable investment policy parameters. Action Points are provided on potential policy flags to help fiduciaries hold investment managers to account.

ACTION POINTS

Concise instructions

Action Points turn insights into instructions. If Mosaic identifies a potential policy flag, an Action Point is created for the fiduciary to review and resolve directly with the investment manager.

Next steps



The next step is for Enhance to provide a personalised presentation to introduce our Consultancy service.

Get in touch

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