

Fund-level Performance Tracker



ABC Fund (Project XYZ)

Overview

LUK Investee Fund Name: [Redacted] Investment Period: [Redacted]
 GP Name: [Redacted] Predecessor Fund Vintage: [Redacted]
 Fund Domicile: [Redacted] LUK Role: [Redacted]
 Fund Term: [Redacted] LUK Total Commitments: [Redacted]
 # of Portfolio Companies: [Redacted] Total Fund Size: [Redacted]
 Transaction Date: [Redacted] LUK % of ABC Fund: [Redacted]

Performance Summary

Investment Vehicle	Total Commitments	UK Commitments				UK Value			% of Total
		Original (Unfunded) Commitments ⁽¹⁾	Cancelled (Unfunded) Commitments ⁽²⁾	Current (Unfunded) Commitments ⁽³⁾	Investment Cost ⁽⁴⁾	Realized Proceeds ⁽⁵⁾	Unrealized Value	Total Value	
UK ⁽¹⁾	XXX.X	XXX.X	XX.X	XX.X	XX.X	XX.X	XX.X	XX.X	XX%
UK A ⁽²⁾									
UK B ⁽³⁾									
Total									

Gross - Gross Returns: [Redacted] % of ABC Fund: [Redacted] % Unfunded: [Redacted] % Invested: [Redacted] DCP⁽⁶⁾: [Redacted] EV (1)⁽⁷⁾: [Redacted] TVPI⁽⁸⁾: [Redacted] IRR⁽⁹⁾: [Redacted]
 Net - Gross Returns: [Redacted]

(1) UK's Subsidy 1: Based on UK B's initial close amount of \$XX.Xm (2) UK Strategic Secondary Subsidy 2
 (3) ABC canceled 26% of the unfunded commitments since the Fund has no remaining unfunded commitment to Comp 3 (4) Investment Cost excludes Fund Expenses (5) Proceeds primarily from Comp 1 Option 1 since 20xx dividend recapitalization (6) DCP stands for distributions to paid-in capital (7) EV (1) stands for relative value to paid-in capital (8) TVPI stands for total value to paid-in capital (9) IRR is net of ABC management fees and carry

Key Updates

- Comp1 (x% of NAV) YTD Sept 20xx revenue and EBITDA were x% and (x%) above and below prior year comparable period, respectively. The revenue outperformance was a result of continued core contract growth but margins continue to underperform due to mispriced contracts. Unexpectedly increased LHM Ratios and rising operating expenses compared to budget have been driven by the accelerated influx of patients combined with increased treatment entitlements (minimum treatment days). The reduction of contract profitability particularly in the Region1, as well as increased labor and benefit costs has decreased earnings expectations for 20xx.
- Comp3's (x% of NAV) public share price traded up in the quarter to \$XX.XX, Comp3's share price is x% above LUK's entry price. As discussed previously, in July 20xx Comp3 announced the acquisition of Target1 which complemented the existing business by bringing substantial access and presence to the Food and Beverage market. As part of the transaction the Target1 CEO became the merged corporation's CEO in October 20xx.
- Comp7 (x% of NAV) YTD Sept 20xx revenue and EBITDA were (x)% and (x)% above with prior year comparable period, respectively. Growth is attributable to impact of HU contract win in December 20xx, the contract was rapidly on boarded in 20xx as well as inc
- Comp5 (6% of NAV) YTD Sept as the business continues to savings reduction initiatives u

Internal Commentary

- Comp1: Please see Q3 20xx CI business, pushing the expect predicated on significant reg
- Comp5: Please see Q3 20xx accretion to EPS of \$XX.X of ~
- Comp4: DCP projects 20xx E implant distribution business systems
- Comp7: Management increas million. The company is on tr

Request and Guidelines Provided

- Client requested a comprehensive process and package to analyse fund and portfolio company performance on a quarterly basis

Methodology and Final Deliverable

- Built out individual analysis sheets for all funds and portfolio companies that records all financial information, business overview, key updates, and other relevant commentary
- Built a performance dashboard that summarizes all key information in the form of charts and tables
- Created value bridges, forecast analysis tables, return projection tables for better visibility on the fund performance



Prepared a fund-level valuation sheet and one-pager company profiles that records and tracks the performance of the fund, and individual portfolio companies