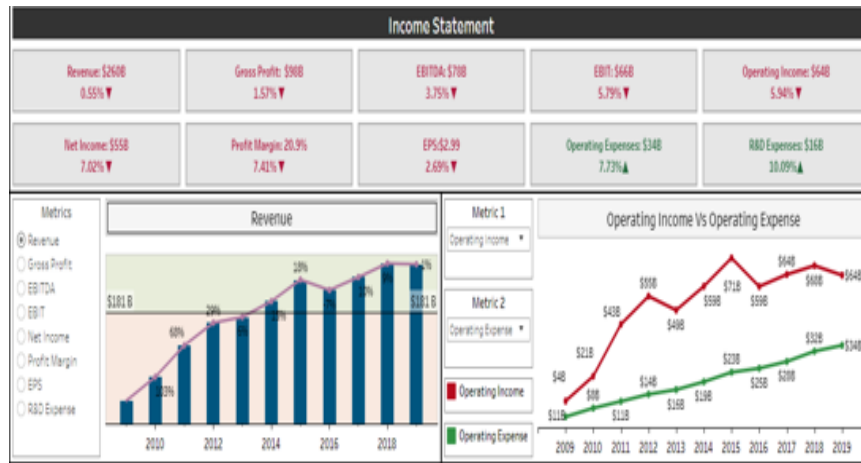


KPI Dashboard



Request and Guidelines Provided

- **Client:** A leading private equity company
- Consolidate financial data of portfolio companies from multiple data sources
- Track and monitor income statements, balance sheets and cash flows of the portfolio companies

Methodology and Final Deliverable

- Created a portfolio monitoring dashboard to track and monitor financials of multiple portfolio companies
- Identified trends over time for profit, sales, expenses, etc.
- Comparison of latest period's value relative to benchmarks (previous/budget)
- Tracking relevant KPIs makes easier and effective management and monitoring of expenses, sales and profits

Tools/Technology used : Tableau, MS Excel