

## Welcome to Performance Plus

**Performance Plus** is the answer for firms looking for best-in-class performance measurement, tailored to their needs. With a modular approach, Performance Plus allows firms to access custom sector attribution, multiple models, and track returns—without unnecessary additional functionality. This creates unprecedented ROI, unlocking value immediately, while also enhancing the transparency, accuracy, flexibility, and reporting of your returns.

### Built for firms looking for:

- **Detailed, comprehensive returns** on all investments, down to the security level.
- Combining **performance and risk** parameters to identify deviations against standard, custom, and model benchmarks.
- **One click drill down** to identify drivers of total, excess, and risk-adjusted returns.
- **Flexible interface** for faster analysis across portfolios, attributes, and asset classes.
- **Complete transparency** into calculations, with robust audit trail.
- Ability to apply **custom factor-based models**, including advanced metrics and ESG.



### Key Advantages:

- Select, create, and easily modify indexes, models, and benchmarks for comparison
- Real-time, on the fly calculations, with details of intermediate calculation steps
- Comprehensive, multi-asset class attribution model with flexible reporting
- Leverage a multi-factor based with ability to isolate return effects
- Simple processes to support carve outs and exclusions
- Custom classification and attributes, available at the security level
- Bespoke reporting and configuration based on user, with complete audit trail

## Main Features:

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- Position-keeping of multi-asset class holdings
- Real-time IBOR valuation
- Full look-through portfolio analysis
- Real-time performance calculations
- Personalized performance environment using customization capabilities under user's control
- Use of native and custom fields as allocation attributes
- Calculation formula details
- Details of intermediate steps
- Standard and advanced risk ratios
- Mathematical formula designer
- Model portfolios and composite benchmarks
- Equity performance attribution (Brinson Fachler)
- Fixed income performance attribution (FBAM)
- Performance module fully integrated with front-to-back suite of modules

**See how Performance Plus  
can help your organization.**

**Speak to an Expert** ·>



### Worldwide Offices

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As the industry-leading SaaS solution for investment accounting and reporting, Clearwater enables growth of assets under management (AUM) for more than 1,100 clients including global insurers, asset managers, corporations, pension plans, and governments. Each day, Clearwater automates data collection, reconciliation, compliance, risk, and performance reporting across \$5.9 trillion in assets with its comprehensive cloud platform and best-in-class service team.

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