

Clearwater Wilshire Axiom:

A complete, multi-asset performance and risk management solution for asset owners and investment managers

The expansion of investments into multiple asset classes has made accurately assessing risk and performance a challenging task for asset owners and investment managers. Insurers, corporations, asset managers, and other financial institutions are looking to get a daily view into their portfolio risk metrics and performance attribution data to identify the underlying source of returns.

Clearwater Wilshire Axiom simplifies intricate market dynamics and provides actionable data at your fingertips. Our powerful platform allows you to stay ahead of market trends by easily dissecting and understanding which factors drive portfolio returns. With solutions for performance attribution, risk analysis, stress testing, and portfolio construction, Axiom's flexible ecosystem increases your confidence in navigating the complexities of multi-asset portfolios.

Full Integration

- With Clearwater Analytics

12 years

- Average operations tenure

40 years

- Experience developing financial models *

Benefits of Clearwater Wilshire Axiom

- Full integration with Clearwater Analytics, as well as flexible benchmark support and customizable reporting to help investors streamline the construction and monitoring of performance benchmarks and metrics for all asset types.
- Preserve long-term value through a comprehensive suite of risk reporting and calculations, including scenario modeling, stress testing, shock analysis, and what-if scenario modeling.
- Enhanced Decision-Making
- Identify factors driving returns, sources of risk, and optimize portfolios using our proprietary factor models. Axiom users are not restricted to specific models. Implement proprietary models to take advantage of our global securities master and pre-canned analytics or leverage existing client-specific models.
- Efficient Portfolio Management
- Risk Management Optimization

Key Features

1) Comprehensive Performance Attribution and Risk Analysis

- Analyze portfolio risk, tracking error, and Value at Risk (VaR) arising from market exposures and benchmark differentials.
- Compare portfolio performance versus benchmark contributions at the security-level, based on any user-defined criteria such as sector, quality, duration bands, and more.
- Identify country, currency, yield curve, sector, and quality exposure differences versus a benchmark to uncover sources of risk.

* Our model coverage spans globally across the North and South American, European, Middle Eastern, and Asia Pacific markets.

2) Shock/Scenario Analysis and Stress Testing

- Stress test portfolios and benchmarks based on user-defined or regulatory shocks to yield curves, currency exchange rates, spreads, volatility, and prepayment levels, including default and recovery rate assumptions.
- Back-test portfolios to measure impact vs. benchmark and identify risk characteristics.

3) Flexible Portfolio Construction and Monitoring

- Construct and optimize portfolios based on current holdings, desired characteristics, available inventory, and investment policies.
- Run a what-if analysis to determine the impact of changes to portfolio characteristics.

With hundreds of performance calculations and benchmarks at your fingertips, Axiom provides unmatched portfolio and risk management to all institutional investors. Speak to an expert and see the power of our solution for yourself today.

Talk to an Expert ·>

Ready to learn more? Schedule a meeting with a Clearwater expert.



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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 \$7.3 trillion in assets with its comprehensive cloud platform and best-in-class service team.

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