

PortfolioNet™

Comprehensive portfolio consolidation and analysis service

The PortfolioNet™ web platform allows you in a few clicks to view all of your assets, to analyse them and to generate personalised reports.

Key Features

- Daily recording of client transactions
- Consolidated portfolio valuations
- View holdings by asset class, currency, etc, ...
- Performance analysis (TWR + Modif. Dietz)
- Contribution by asset class and instrument
- Performance attribution
- Portfolio monitoring and management tools
- Risk-return analysis
- Secure communication with clients

Benefits at a Glance

- Intuitive and easy to use interface
- No specific local infrastructure or staff requirements
- Security database management included in the service
- Access to professional data entry, programming, support and advisory staff
- Enhance profits with optimised cost control
- Capacity to increase volumes at any time
- Achieve GIPS certification
- Fully secured environment



About Galeo

Galeo is a Swiss company founded in 2003 offering solutions for assets consolidation, portfolio management and investment analysis. With its range of systems, services, expertise and support, Galeo is an ideal partner for all enterprises wishing to enhance their services.

As the representative of vwd group, one of Europe's prime financial information supplier, Galeo benefits from the backing of a leading international group.

For more information about our services and products, do not hesitate to contact us:

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