

# Portfolio Check

- » Independent assessment of performance and costs
- » Identification of risks related to investment instruments
- » Recognizing need for action

Regardless of the size of their assets, investors want to achieve their individual objectives. If no systematic investment controlling is in place, it may be worthwhile to have a specialised consultant assess the market conformity of the performance, the fee level and other aspects of investments within the scope of a portfolio check. This ensures that any need for action is identified quickly and with little effort.



## Performance analysis

Performance is assessed by means of a benchmark and peer group comparison. Evaluations of the performance are even possible without a benchmark.



## Governance

Upon request, we assess the investment organisation, the responsibilities and the specific investment decision-making process for best practice and potential conflicts of interest.



## Risk assessment

Furthermore, the various risks of the investment instruments used are analysed: counterparty risks, legal risks, concentration risks, etc.



## Implementable recommendations

The result of our analysis is a list of actions that can be easily and efficiently taken to improve the portfolio.



## Fee comparison

We calculate and evaluate your asset management fees based on our comprehensive fee database (one of the largest in Europe).



## Know-how and experience

As a pioneer in investment controlling with over 30 years of experience, PPCmetrics has an unbroken innovative strength.



## Contact

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