

excel reporting module

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*How do you integrate **performa**'s vast database into your spreadsheets? Would you benefit from the flexibility to view, manipulate, analyse and share this data in report format with the rest of your organisation? How do you achieve this without compromising on data security or ease of access?*

Meet all your complex reporting demands using the **performa Excel Reporting Module (XRM)**. Access all your audited performance numbers without restriction. Utilise our in-built calculation engine to create highly customised statistical spreadsheets and deliver a full range of professional reports quickly and efficiently.

The **performa XRM** is the answer for your regulatory, client and management reporting needs. End users benefit from step-by-step Wizards to assist in rapidly obtaining desired information easily. Automate and streamline the production process and create high quality bespoke reports for both internal and external clients.



The **XRM** provides you with a toolset amalgamating the graphical and analytical powers of Excel, with the calculation power of **performaglobal**. Benefit from the flexibility to view, manipulate, analyse and share Performa data in a customised report format across your entire organisation and client base.

The technical requirements are as follows:

Client

- Microsoft Excel 2000 or above
- **performaglobal** R2.7.0 or above

performa consultants uk limited (performa)

Established in 1999 by a group of investment performance specialists, **performa** focuses solely on providing an efficient and cost-effective solution to assist investment managers in achieving GIPS® compliance. GIPS are ethical standards for performance presentation used by investment managers to ensure fair representation and full disclosure. These standards are enforcing industry self-regulation on a global basis.

The **performaglobal** product is the chosen solution to the challenge of GIPS compliance and is used to manage over \$1 trillion of global assets. It is not only proving to be the optimal tool for composite construction, but also has a wealth of additional functionality including complex benchmark construction, business rule definition, full audit trail and powerful scheduling system. The multi-currency and multi-language web enabled reporting suite facilitate portfolio, composite and management reporting.

However, the **performa** service encompasses much more than the software product. Full implementation and on-going support are provided by dedicated and experienced professionals from within the performance industry. Clients are offered comprehensive advice and hands-on support from the early stages of their GIPS project planning right through to project completion. This level of service has ensured the steady increase in **performa's** blue chip client list and confirms **performa's** position as the number one supplier to the investment management industry.



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