



PortIQ

NETSUITE ANALYTICS WAREHOUSE FOR PRIVATE EQUITY

A transaction-level view
of your portfolio. Daily.

WHAT IT DOES

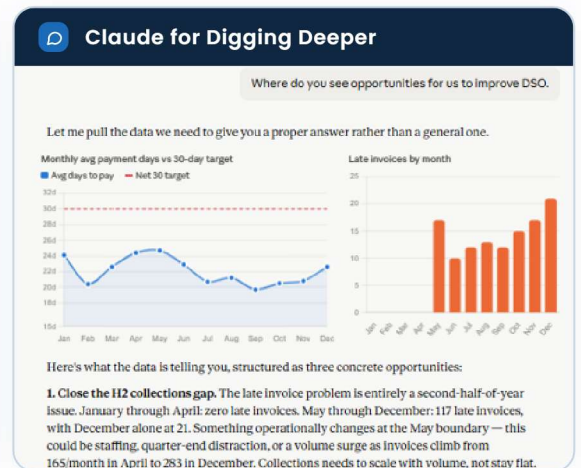
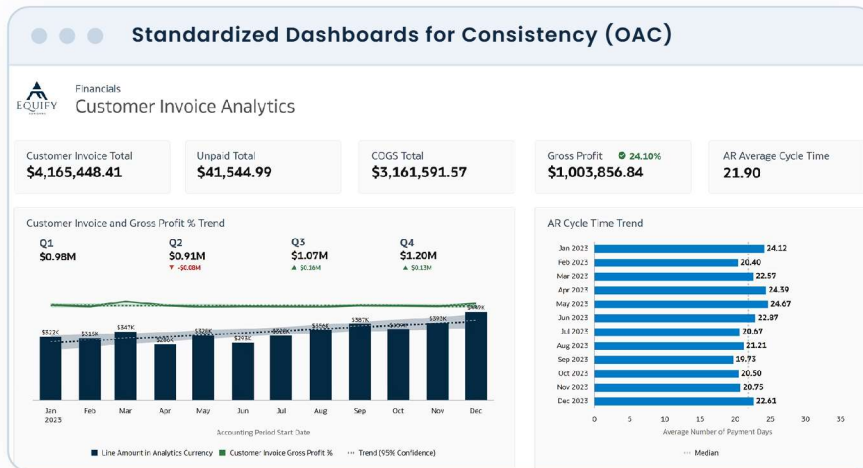
Daily insight into transaction-level performance across your portfolio, all governed and reported out of a platform **that you own**.

PortIQ pulls your portfolio company's financial and operational data into a single platform your firm owns, then surfaces it through ready-made dashboards and on-demand analysis with Claude. Spot pricing, vendor, and working-capital opportunities early, and walk into every strategic call ready to act, not just review.

THE SOLUTION



WHAT YOU GET



WHY THIS SOLUTION



Time to Value

Everything lives in the Oracle NetSuite ecosystem you are familiar with. This also means prebuilt connectors and architecture that accelerates rollout and adoption.



AI-native, end to end

AI features are built into the BI layer, and an MCP-enabled architecture lets Claude query your governed data directly, in plain English, down to the transaction.



One partner, one platform

No need to juggle multiple vendors or specialists to burn time and effort collaborating silos. What traditionally was a highly complex effort is now executed in one stack.