IM Investment Management | POWERED BY SAMTA

INFOGRAPHIC

How Investment Management turns portfolio data into *early action.*

Capital, operations, financing and risk — one dashboard for every fund, property and loan.

5 core views | Multi-fund | Instant risk alerts

TRADITIONAL REPORTING

- A spreadsheet for every fund
- Days to build one report
- Risks spotted too late

WITH INVESTMENT MANAGEMENT

- One dashboard, every fund
- KPIs ready the moment you log in
- Alerts before problems grow

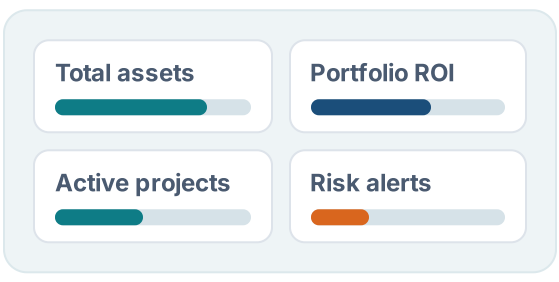
THE FLOW

Five views, *one portfolio*

1

Start with the big picture

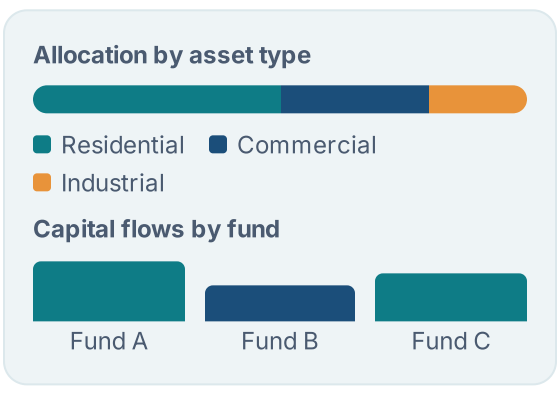
Portfolio Overview shows total assets, portfolio ROI, active projects and open risk alerts the moment you log in.



2

Follow the money

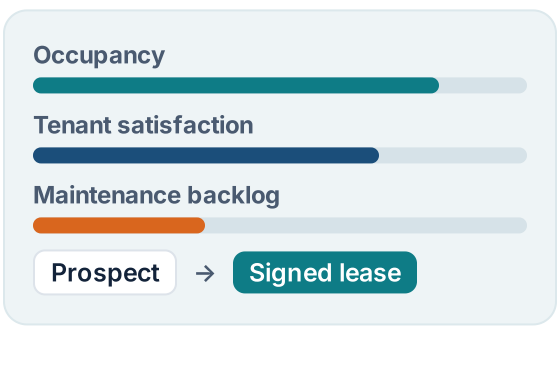
Capital Management tracks net capital, ROE, ROIC and debt-to-equity, with flows across funds and the split by asset type.



3

See every property

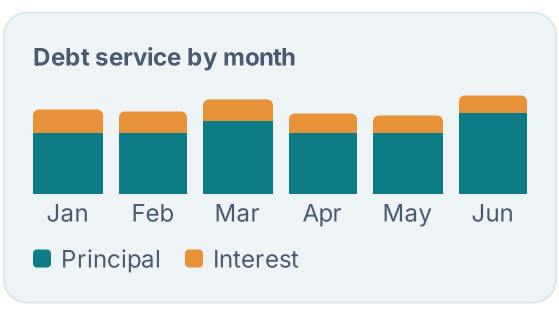
Operational Performance covers occupancy, tenant satisfaction, maintenance backlog and the leasing pipeline.



4

Plan every repayment

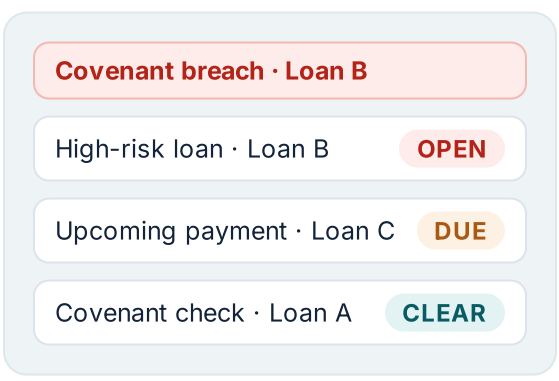
Financing Insights shows outstanding debt, interest, coverage ratios and loan-to-value, month by month.



5

Act before it grows

Risk Alerts flag high-risk loans, upcoming payments and covenant breaches instantly.



Track *every number*

3 METRIC GROUPS

CM
Capital
Net capital · ROE · ROIC
Debt-to-equity · P&L

OP
Operations
Occupancy · Tenant satisfaction
Maintenance · Leasing

FR
Financing & risk
Debt · Coverage · LTV
NPAs · Vacancy risk

Built for *every seat*

WHO IT'S FOR

PORTFOLIO MANAGERS
Performance in view
Track returns and allocation across funds and asset types.

FINANCE TEAMS
Debt under control
Monitor debt, coverage ratios and every repayment.

LEADERSHIP
The whole picture
See the full portfolio and its risks at a glance.

IM
Investment Management
CORA

Ready to see your *whole portfolio?*

See how Investment Management brings capital, operations, financing and risk into one view with a personalised demo.

7 Days FREE Trial
Scan the QR code to book your demo now!
samta.ai/platform/investment-management