



PFaroe E&F software is a web-based platform that gives endowment portfolios investment risk and simulation analytics tools. In-house investment teams and CIOs can take advantage of the resources of PFaroe to deliver a powerful framework that manages the impact of downside risk on an endowment's corpus and spending needs.

### Enhance performance and maximize market opportunities

- » Test policy portfolios and optimize fund strategies and managers, employing several techniques from "what-if" scenario testing through powerful stochastic modeling using a sophisticated economic scenario generator.
- » Monitor and optimize reporting on the investment portfolio and risk and speed up the Board reporting cycle, allowing CIOs to focus on portfolio management, not number-crunching.

- » Assess investment solutions from multiple perspectives with several types of built-in spending formulas to produce a comprehensive suite of spending, asset, and risk analytics.
- » Perform sophisticated modeling previously available only to the largest endowments and foundations.
- » Review new managers or investment strategies quickly, and become more responsive to investment opportunities and market dislocations through real-time analysis.
- » Devise investment strategies that react to market events or economic scenarios.

## Deliver operational efficiency, improve governance, and forecast mission delivery

- » Define a risk framework based on how the organization measures success, such as spending goals, portfolio real value, and performance relative to a policy portfolio.
- » Take advantage of faster response times to stakeholder queries by automating tailored reporting on demand and at the click of a button.
- » Forecast the likelihood of endowments or foundations delivering on their mission through deterministic, stochastic projections of their portfolio's spending contribution to the organization's budget.
- » Optimize budgeting at the CFO level by analyzing the direct impact of investment decisions, gifting patterns, and capital campaigns.
- » Consolidate systems and services, eliminate manual intervention, and improve security to minimize errors and maximize cost and time savings.



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