



Portfolio Analysis

Portfolio analysis is a process in which your credit union's investment portfolio is examined for performance value and potential. The information garnered from regular, comprehensive analysis is used to guide a future course. Routine analysis helps your credit union not only determine areas of concern before they become complicated problems, but it also helps you pinpoint areas of success so you can take timely advantage of opportunities.

Expert portfolio analysis takes time, skills, and sophisticated data processing technology. Portfolio analysis is one of our specialties, and because of that, we can devote more attention and time to performance examinations than most credit union leaders. We have highly trained analysts whose sole mission is to find ways to make credit unions more successful.

Key Benefits

1. Deliver more A+ performances more often.
2. Pinpoint areas of untapped earnings potential.
3. Avoid unnecessary risk exposure.
4. Help credit union managers and asset liability committee members make more informed balance sheet liquidity/risk management decisions.

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