

**BondVALU**

HOW BONDVALU HELPED THIS PORTFOLIO MANAGER Monitor Muni Bonds More Efficiently

As a portfolio manager at a high net worth advisory firm, I oversee bond portfolios with a small team. We have a decent number of bonds that either we buy or we inherit when accounts come over.

Before using BondVALU, much of our monitoring process was manual and intensive. We were pulling information into spreadsheets, sorting through holdings one by one, and trying to piece together a view of where credit issues might be developing. That took time, and it also left me concerned about whether something important was slipping through the cracks. And it was worse when we were looking at municipal bonds and smaller issuers, where some of the bonds are just not rated.

We needed a better way to review inherited positions, monitor what we already held, and make informed decisions about what to keep and what to sell.

IDENTIFYING POTENTIAL CREDIT ISSUES SOONER

BondVALU gave us a more practical, automated process. It helps me sort through bond holdings quickly, spot credit trends, and identify potential issues earlier. I don't have to go through a bunch of Excel tricks or download load of data.

I value the credit momentum score most, because it gives me insights I wouldn't have the time or bandwidth to build. The biggest difference is confidence. BondVALU relies on scrubbed data from DPC DATA, so we have confidence in the data. Overall, I have a higher level of comfort that I am catching what I need to catch and evaluating the portfolio in a more consistent way.

A COST-EFFECTIVE PORTFOLIO MONITORING TOOL

The bottom line is BondVALU has saved me an enormous amount of time while providing me more comfort that I'm doing my job correctly and more thoroughly. For a firm our size, BondVALU is a good monitoring tool, and the price makes sense for the value it provides.

BondVALU offers a quick and easy way to monitor your portfolio, understand which bonds are potentially getting into trouble. The bottom line is it has saved me an enormous amount of time, while providing me more comfort that I'm doing my job correctly and more thoroughly.

PORTFOLIO MANAGER, HIGH NET WORTH ADVISORY FIRM

LEARN MORE ABOUT BONDVALU

Contact us at 800-996-4747 or sales@dpcdata.com to learn more, schedule a walkthrough, or talk about integration.