



CLOCKWORK®

Feature List

Private Investment Platform

clockwork.app

DATA INGESTION

DATA AGGREGATION

DATA PROCESSING



PORTFOLIO MONITORING

Track and manage investment portfolios across asset classes.

- **Portfolio Dashboard:** Monitor investment and pipeline portfolios with dynamic update feeds of quantitative and qualitative data
- **Transaction Management:** Organize and analyze data and performance at the transaction, holding, and portfolio level



OPPORTUNITY TRACKING

Discover and track new investment prospects.

- **Investment Profiles:** Monitor prospective investments with file and information storage, and custom tagging
- **Opportunities Pipeline:** Organize opportunities for current and future consideration, with easy search and filtering
- **Explore & Share:** Expand inbound deal flow and share opportunities among co-investor networks



INVESTMENT PERFORMANCE METRICS

Track investment progress and compare performance across your portfolio.

- **Custom Metrics:** Create and track metrics for individual investment holdings with different KPIs
- **Portfolio Metrics:** Monitor common metrics across investments for a holistic portfolio view



DYNAMIC INVESTMENT PROFILES

Manage investments with customizable profiles for detailed information storage throughout the investment lifecycle.

- **Information Storage:** Store essential details, documents, and notes for each investment opportunity
- **Custom Tagging:** Organize investments by tags for easy filtering and analysis
- **Collaborative Sharing:** Share profiles with co-investors to enhance collaboration and decision-making

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FILE AND CONTENT SHARING

Centralize and organize documents in one place.

- **Data Collection:** Find what you're looking for quickly with file indexing
- **Automated Email Digests:** Stay informed in your inbox with scheduled summaries and alerts
- **Reporting:** Better measure performance and monitor information with reporting outputs, handle group permissions and list management

STAKEHOLDER MANAGEMENT

Consolidate crucial information from different sources and receive dynamic updates.

- **Reporting:** Permissioned sharing with reporting and logins for key parties to access updates, files, and more
- **Stakeholder Activity & Communication Tracking:** Track investment metrics across portfolios, holdings, and transactions for other stakeholders or investors
- **Branded Portal:** White-labeled login for an intuitive and on-brand experience

DATA INGESTION

Streamlining data inputs from various disparate sources across email, third party portals, and other.

- **Automated feeds:** Forward emails to app-connected inboxes for streamlined investment record keeping
- **Suggested updates:** System-led organization of files and content
- **Automated digests:** Daily, weekly, or real time email summaries sent right to your inbox

CHAT

Foster collaboration, connect and exchange insights with ease

- **Chat with other investors:** Converse about shared investments, new deals, and more with known investors
- **Stay on top of your investments:** Engage your portfolio companies, fund managers and operators