

Private Equity (PE) offerings

Key focus areas for private equity firms

- Subdued investment returns driving need for cost optimization
- Increased demand for transparency from the limited partners (LPs) as well as call for reduction in management fees
- Enhanced pressure to meet various reporting and regulatory obligations

The business imperative

In a competitive world, private equity firms are looking to constantly invest in technology and drive operational efficiencies. Firms are investing in technology to improve investor reporting / communication and automation of routine processes, while driving operational efficiencies through outsourcing non-investment and tactical tasks to third-party specialists to deliver consistently high-quality service.

Our solution

Infosys offers a comprehensive suite of services to leading global private equity firms. Our services span the front, middle, and back office including investment research, market intelligence, portfolio monitoring, and finance & accounting services. Our offerings are backed by strong accounting domain and process improvement capabilities.



Front Office

- Origination support
- Target screening, shortlisting, and assessment
- Sector-level and company-level research, assessment, analysis, and insights
- Investment thesis and Go / No-Go analysis
- Market intelligence – PE landscape, sector dynamics, and competitive intelligence
- Divestment decision support – market and target analysis
- Environmental, Social, and Governance (ESG) Research

Middle Office

- Analysis of portfolio companies' qualitative / quantitative data
- Sensitivity analysis of key external factors on portfolio performance
- Reporting of portfolio performance for client leadership
- Reporting / Analyzing key operational metrics of PE business
- Competitor benchmarking and valuation support

Back Office

- Accounts payable
- Financial control and statutory accounting
- Financial accounting and reporting
- Portfolio accounting
- Carry accounting
- Fund accounting
- Regulatory reporting
- Budgeting
- Forecasting
- Creation of tax packs
- Addressing investor and auditor queries



Key pillars of our solution

- **Deep understanding of PE operations and processes:** Our team of experts has been working with global PE firms for a decade and has rich, in-depth understanding of business dynamics and PE processes ranging from origination to portfolio monitoring and finance & accounting.
- **Experienced analysts and accountants:** Our team has a large pool of qualified and experienced analysts and chartered accountants with strong process transitioning, delivery, and improvement capabilities. Our team has proficiency in eFront, Investran, and Geneva accounting platforms.
- **Robust frameworks, accelerators, and tools competency:** Our PE frameworks and accelerators can be customized based on specific client requirements. Our frameworks and tools are geared to improve effectiveness and efficiency of PE operations and enhance customer experience.

An illustrative list of system and database competencies is given below:

Investment accounting systems			
eFront	Geneva	Agresso	Eagle
Research databases			
Bloomberg	Orbis	Preqin	unquote"
S&P Capital IQ	Factiva	Mergermarket	Thomson Reuters

Our credentials

At Infosys, we have a decade of experience in research and accounting services for the private equity industry. We offer these services in a global delivery model from India to leading global private equity firms.

Realizable business benefits

- Reducing operating costs as a percentage of assets under management (AUM) (~40% cost savings)
- Improved processes resulting in enhanced business efficiencies (~20% productivity benefits)
- Facilitating regulatory reporting and compliance while optimizing costs
- Improved reporting and visibility of portfolio performance

For more information, contact askus@infosys.com



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