

Portfolio Monitoring and Dashboarding

Portfolio Monitoring Dashboard

April 2024



Portfolio Monitoring Dashboard

TresVista created a dynamic portfolio monitoring dashboard that allowed the client to monitor their monthly portfolio performance

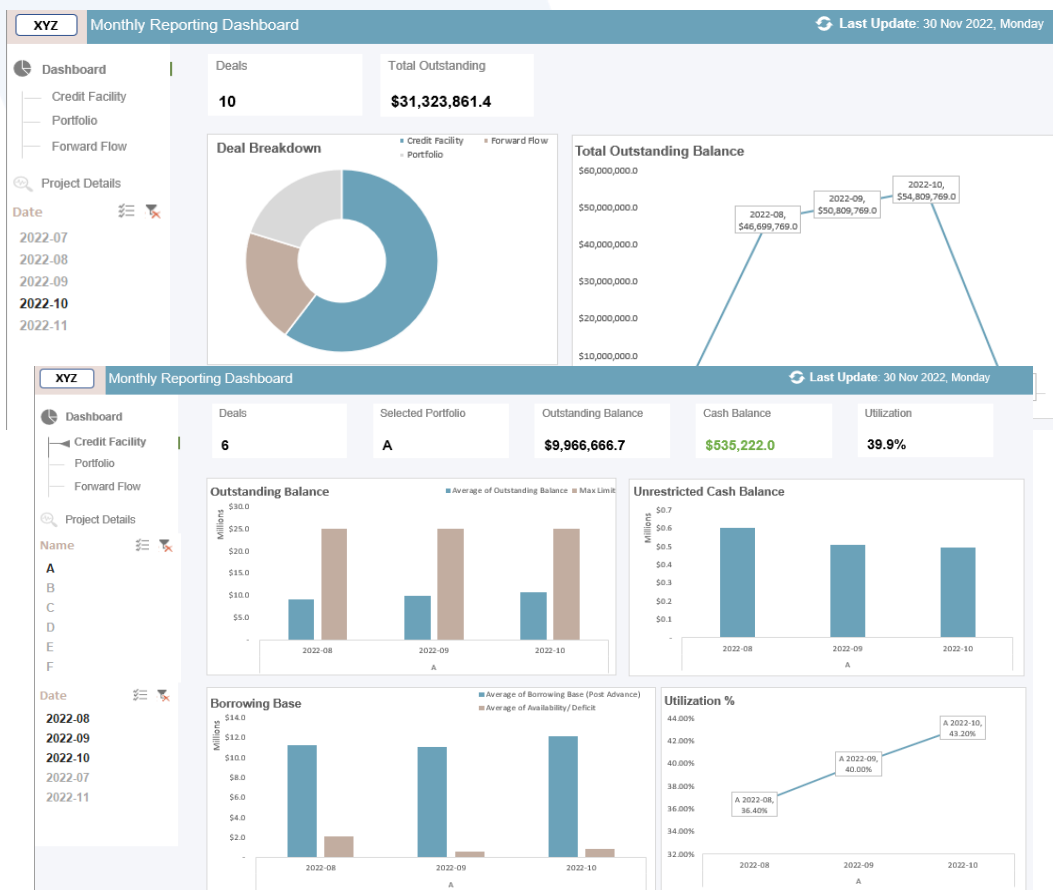
Request Overview

- To build a live dynamic dashboard that allows the client to view details such as outstanding balance, utilization percentage, cash balance, etc. pertaining to their portfolio over a period of time
- The client wanted to look at their deal concentration and view performance trends across different types of deals along with the ability to view specific deal details lying within the broader categories

Final Deliverable and Value Add

- The final deliverable consisted of a dynamic portfolio monitoring dashboard allowing the client to overview their portfolio
- Provided a breakdown of different types of deals
- Provided a functionality to focus into specific deals and view performance metrics over a time span

Output Snapshot



The background features a dark blue field with two large, overlapping geometric shapes. On the left, a light blue shape points downwards. On the right, an orange shape points upwards. The two shapes meet at a central point, creating a V-shape.

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