PORTFOLIO INSIGHT

D&B Finance Analytics

CREDIT INTELLIGENCE

Gain deep visibility into your company's accounts receivable with D&B Finance Analytics Credit Intelligence

dun & bradstreet

Add another dimension to your data to more effectively manage your accounts receivable. With Portfolio Insight from D&B Finance Analytics Credit Intelligence, your A/R data is combined with Dun & Bradstreet's risk analytics to give you a big-picture view of your overall performance. Easy-to-read charts and graphics provide a clear view of risk breakdowns and trends to help you quickly understand your company's current risk distribution of total outstanding and riskiest accounts.

With Portfolio Insight, you can:

STRATEGICALLY MANAGE RISK & OPPORTUNITY

See how your customers are paying you, versus how they're paying others. Comprehensively assess risk and growth opportunities in your global portfolio by comparing your aging against Dun & Bradstreet's payment analytics. You can also view how your customers are categorized by different risk types and segmented by industry, aging ranges, and credit limit utilization. Reports quickly take you from critical summary overviews to comprehensive intelligence with just one click.

QUICKLY PINPOINT RELEVANT SEGMENTS

With a better understanding of overall risk distribution, you can easily prioritize account management and optimize credit limits across your customer base. Portfolio Insight offers advanced analysis capabilities to help you spot trends and reveal new levels of risk and opportunity. Quickly filter your portfolio to focus on relevant segments and take immediate action to better align your accounts with your company's credit policies.

SHARE KEY INSIGHTS

Confidently communicate important portfolio changes across your organization by easily creating and sharing performance reports. You can configure your account exports to include a select group of data or the full 300+ available data elements.

Portfolio Insight completely transforms your process, resulting in:

→ End-to-end visibility into global risk distribution

→ Improved portfolio management

→ Ability to identify growth opportunities

Easily Manage Your Global Portfolio with Portfolio Insight

Risk Breakdown

The Risk Breakdown helps you identify your best and worst accounts and emerging areas of risk in your portfolio by comparing a risk type e.g., Failure Risk or Delinquency Risk, with one of four other options:

1. Risk Type
Prioritize collections and grow business by identifying your best and worst customers across your portfolio.

2. Aging
Help improve cash flow by prioritizing collections based on aging buckets, to better prioritize collections before accounts become severely delinquent.

3. Credit Limit Utilization
See distribution of accounts that may require further action, opportunistic or protective, based on the total outstanding compared to utilization of assigned credit limits.

4. Total Outstanding
Understand how much exposure you have by bucketing accounts into total outstanding ranges of low, medium, and high risk.


Risk Distribution

The Risk Distribution report reveals your portfolio segmented by selected risk types based on total outstanding or number of companies.

Corporate Linkage

The Corporate Linkage report helps you increase your understanding of portfolio exposure and opportunity by knowing the relationships between corporate entities both in and outside of your portfolio. Other available segmentation reports include industry, country, size of business (number of employees), and years in business.
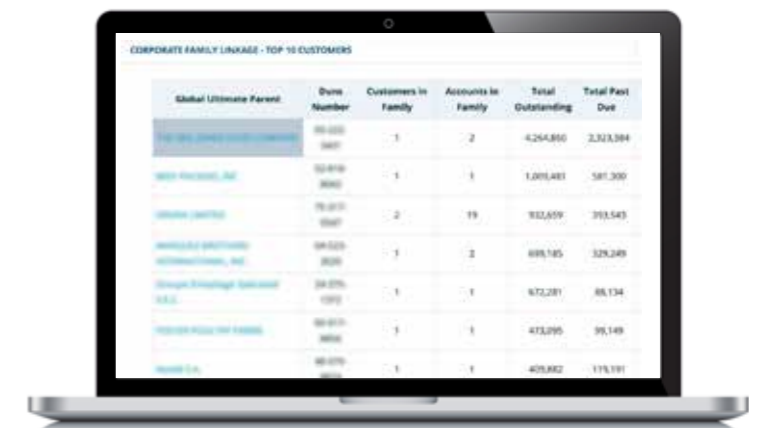
→ See your data come alive with Portfolio Insight from D&B Finance Analytics Credit Intelligence.
Contact your Dun & Bradstreet relationship manager to learn more.

D&B Finance Analytics

D&B Finance Analytics is a complete credit-to-cash platform froma global leader in business decisioning data and analytics.

To get started with D&B Finance Analytics, contact us today!

ABOUT DUN & BRADSTREET

Dun & Bradstreet, a leading global provider of data and analytics, enables companies around the world to improve decision-making and business performance. Dun & Bradstreet's Data Cloud fuels solutions and delivers insights that empower customers to accelerate revenue, lower cost, mitigate risk, and transform their businesses. Since 1841, companies of every size have relied on Dun & Bradstreet to help them manage risk and reveal opportunity.

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