



Managed Data Services

Supporting Portfolio Company Data Collection for General Partners

Cobalt's Managed Data Services (MDS) provide our general partner clients with a hands-on service to collect data directly from their portfolio companies and upload their required metrics into their Cobalt database. Cobalt clients predefine the performance metrics they need from their portfolio companies, and the Cobalt MDS team takes care of the rest.



Why Cobalt MDS?

Cobalt MDS eliminates the time-consuming steps between a GP issuing data requests and actually being able to run analytics and reports on their portfolio. It automates data collection with a "human touch" so that data accuracy and flexibility are never lost to technical automation.

How It Works

1. The GP's portfolio companies submit their financial, operating and KPI metrics along with supporting documents directly to the Cobalt MDS team.
2. The Cobalt MDS team enters the performance metrics into data collection templates and uploads the data files to the Cobalt database.
3. The GP receives an automatic email notification when new data collection files are submitted.
4. The GP reviews the submitted data in Cobalt and goes through the workflow-driven review and approval process.
5. Rinse and repeat on a monthly or quarterly basis — creating custom, flexible metrics as needed.

The Benefits

- ✓ Stop chasing portfolio companies for data
- ✓ Eliminate multiple data template uploads
- ✓ Easy data review and approval process
- ✓ Dedicated specialist to ensure accuracy

Interested in learning more?

Get in touch with our team:

support@cobaltgp.com

www.cobalt.pe

+1-617-982-6096, Ext. 805

The Cobalt MDS Team

Our team of professionals is focused on getting your portfolio company data into Cobalt so that you don't lose valuable time tracking that data down. Available and priced on a monthly or quarterly basis, the Cobalt MDS team will develop a seamless relationship with you and your portfolio companies and take responsibility for quality data collection.