

CLIENT FACT SHEET

CLIENT



OVERVIEW

Garmin has portfolios distributed across eight investment managers, and their manual reporting processes made evaluating these various managers' returns and performance difficult. Gathering data from so many different entities made closing their books at month-end and preparing regulatory disclosures tedious and time-consuming.

With Clearwater, Garmin has access to a detailed and consolidated view of all their investments at any time. Clearwater's customizable reports and dashboards provide Garmin with clear metrics to analyze their managers' performance. In addition, they can quickly pull data and run reports for regulatory disclosures like SEC Forms 10K and 10Q, FAS-115, and others.

CORPORATE PROFILE

INDUSTRY

- Technology

PORTFOLIO

- \$1.5 billion +
- Corporate debt, municipal bonds, agency bonds, and more

REASONS FOR CHOOSING CLEARWATER

- ✓ Customizable reports for a consolidated and detailed view of investments
- ✓ Precise metrics and customizable benchmarks for analyzing managers' performance
- ✓ Streamlined and automated reporting for regulatory disclosures
- ✓ Efficient month-end close process

“ We love Clearwater for the simplification it provides. We have the ability to know in real-time what our holdings and their market values are. With the incredible volatility in our economic times, it's a comfort to know you don't have to wait until the end of the month to see where your investments stand, and to be able to report on them at any time. ”

Tim Johnson
Director of Finance, Garmin



Consolidated Data from Multiple
Investment Managers

TO LEARN MORE, PLEASE CONTACT US AT
208-918-2252 OR SALES@CLEARWATERANALYTICS.COM