

Allvue Portfolio Optimizer

CLO Portfolio Optimization, Powered by Loan Hunter

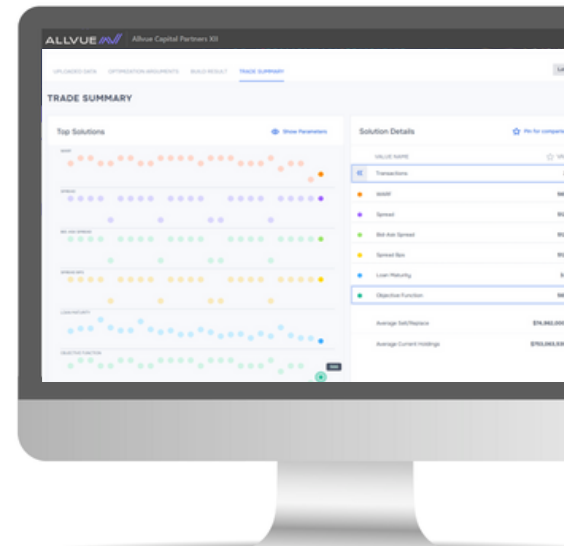
Challenge

Fragmented workflows, disconnected systems, and inefficient trade modeling tools make identifying and executing the best trades time-consuming and manual. Dynamic markets fueled by electronic loan trading mean CLO managers need automated, integrated workflows to shorten the decision-execution cycle, reduce manual effort, and ensure real-time compliance.

Solution

Allvue's Portfolio Optimizer, powered by Loan Hunter, unifies portfolio, market, and compliance data to deliver real-time, multi-portfolio, automated trade suggestions. It uses AI to optimize portfolios across aggregated data sets and constraints.

Portfolio Optimizer helps CLO and private debt portfolio managers make better-informed, compliant decisions faster by surfacing actionable trade ideas. These blend market data and intelligence with your firm's fundamental, bottom-up research to streamline portfolio ramp-up, reinvestment, and rebalancing.



Optimize CLO Portfolio Management with AI-Enabled Workflows



Real-Time Trade Recommendations

Generate compliance-ready trade suggestions aligned with your objectives using advanced AI algorithms.



Scenario Modeling for Smarter Planning

Visualize hypothetical trades to assess impact on portfolio performance, empowering data-driven decisions that align with risk and return goals.



Simplified Pre-Trade Compliance

Automate compliance and receive trade recommendations to eliminate bottlenecks and reduce risk.



Seamless Credit Research Integration

Connect investment insights, analyst recommendations and liquidity data for better-informed portfolio builds and rebalancing.

Seamless CLO Lifecycle Support

Portfolio Optimizer, powered by Loan Hunter, supports each stage of the CLO lifecycle. It provides real-time, actionable insights to portfolio managers, traders, middle office, and operations, enabling robust compliance and data-driven decision-making.

Warehousing and Ramp-Up

Model and structure the initial loan portfolio efficiently by inputting parameters and constraints. Portfolio Optimizer builds a performance-optimized, compliant portfolio aligned with your investment strategy.



Reinvestment and Rebalancing

Identify, evaluate, and test trade ideas for reinvesting and rebalancing to optimize performance and ensure ongoing indenture compliance. Make confident, rapid investment and trade decisions that simultaneously enhance portfolio performance and strengthen policy adherence.



Robust CLO Compliance

Allvue Compliance Management integrates exposure and market data to deliver comprehensive compliance across the credit trade lifecycle. Combined with Portfolio Optimizer, Compliance Manager enables hypothetical testing, pre-trade validation, trade allocation, post-trade compliance, and continuous portfolio monitoring.



Why Allvue

Our purpose-built software has been adopted by the world's leading credit investment managers. Portfolio Optimizer enhances our integrated credit platform, which is trusted by 20 of the top 25 CLO managers.

LEARN MORE

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