Your portfolio, *in perspective.*

Axeron Capital Intelligence
By Axeron AI · For private equity and venture capital teams

A portfolio review should begin with the questions that matter. Where is performance changing? Which company needs attention? What is happening to cash? And what should the team investigate next?

Too often, answering those questions starts with another round of spreadsheets, separate company reports, and requests for context. By the time the material is assembled, the meeting is already under way.

Axeron Capital Intelligence brings portfolio comparison, company financials, AI-assisted analysis, scenario planning, and supporting documents into one workspace. It gives investment, operating, and finance teams a common place to review the businesses they follow and prepare their next conversation.

Start with the portfolio, then follow the question

The portfolio view puts company performance side by side. Teams can compare revenue, profitability, working-capital measures, growth, liquidity, and data quality, then move into the company that warrants a closer look.

That changes the rhythm of a review. An operating partner can begin with a portfolio-wide question about collections, compare days sales outstanding, and open a company's working-capital or receivables view. An investment professional can review margins alongside revenue trends. A finance team can inspect the periods and detail behind the headline figures.

The executive dashboard provides the entry point. Dedicated views cover profit and loss, balance sheets, cash flow, revenue, working capital, and receivables aging. Charts establish the pattern; tables provide the detail for the next question.

Ask in plain language, keep the review grounded

The AI Assistant lets users ask a financial question without first constructing a report. A useful starting point is: "Compare collections across the portfolio. Show the reporting period and the questions we should take to the finance team."

In the product walkthrough, that kind of request produced a comparison table, written observations, and follow-up questions. The conversation remained available in a saved thread. An expandable activity panel showed the steps reported by the assistant, including intent classification, data lookup, query execution, and response preparation.

The practical benefit is a shorter path from a question to material the team can review. The analyst can refine the question, examine the underlying figures, and decide which issues deserve action. Generated commentary remains a draft for professional judgment: a plausible explanation still needs evidence, and a forecast still depends on its assumptions.

Make cash and exceptions part of the routine

A growing business can still require a difficult conversation about collections or liquidity. Axeron Capital Intelligence places those questions alongside the performance review.

Working-capital views expose collection and payment measures, balances, and period detail. Receivables aging separates newer balances from older overdue amounts. Cash-flow views bring operating, investing, and financing movements into the same review process.

Configurable thresholds give the team a place to define what needs attention. The interface includes thresholds for collections, profitability, liquidity, debt, and data quality. Anomaly views highlight unusual movements and distinguish possible explanations as hypotheses. These tools help structure a review queue for the finance team’s assessment of the business.

Explore assumptions before the next decision

Scenario planning turns a discussion about the future into an explicit set of assumptions. Users can select a company, metric, and horizon, then examine forecasts or alternative scenarios.

The Custom Builder exposes growth, volatility, and trend dampening. Changing those assumptions produces a new projection and uncertainty bands. Other forecasting views include bull, base, and bear scenarios, simulation, and backtesting controls.

For an operating team, this can support a discussion about a company’s plan. For an investment team, it can help organize the questions behind a growth or cash-flow case. The team can compare the assumptions and assess how each one changes the projected result.

Bring company information into the same conversation

The company Data Room gathers the business profile, products and end markets, public comparable information, filing references, integration information, and document-library access. News and research add a place to review external context.

The document library organizes material such as board decks, financial statements, operational reports, and diligence documents. Portfolio-company onboarding includes invitation, progress, and data-request workflows. Requests can specify the information needed, a category, priority, and due date.

For private-company portfolios, this provides a structure for collecting operating and financial information. Public-company context can inform comparison and research within that structure. The same review approach can serve private equity and venture capital teams, with the company mix, reporting cadence, and metrics agreed for each deployment.

Connect the data, define the controls

A successful rollout begins with the firm's reporting requirements. Which systems hold the data? Which periods and definitions make companies comparable? Who should see each company's information? Which outputs require review?

The platform presents an integration architecture using ERP data, Fivetran, Snowflake, and dbt transformations. Connections, refresh schedules, and data mappings are configured for the deployment. Each deployment should confirm its configured connections, data coverage, and refresh behavior.

Authentication, user administration, data-quality checks, and visible assistant activity provide useful control surfaces. The required company permissions, identity configuration, and audit coverage should be validated against the firm's operating model as part of implementation.

A more focused portfolio conversation

Axeron Capital Intelligence is designed to bring the numbers, the question, and the supporting context closer together. Partners can focus the review. Operating teams can investigate performance and cash. Finance teams can prepare the evidence behind the discussion.

Begin with a defined portfolio-review workflow and the data it needs. Measure the time spent preparing that review, resolving missing information, and following up on exceptions. Those measures provide a practical basis for assessing the benefit in your firm.

Arrange a portfolio walkthrough with Axeron AI. Bring the questions your team asks every month.