



ILPA RELEASES PORTFOLIO COMPANY METRICS TEMPLATE AS RESOURCE FOR THE PRIVATE EQUITY INDUSTRY

PortCo Template Aims to Improve Reporting Efficiency for Buyout and Growth Funds

March 21, 2019– (Washington, DC and Toronto, ON) – The Institutional Limited Partners Association (ILPA) released its [Portfolio Company Metrics Template](#) (PortCo Template) today after incorporating industry comments submitted in late 2018. The PortCo Template, which is publicly available for download on ILPA’s website, offers a standardized approach for buyout and growth funds to report individual company information to a Limited Partner. The goal of the PortCo Template is to reduce the resources required by General and Limited Partners alike to create, populate and consume these data reports, most which today come in bespoke formats. By using a consistent and common format, both LPs and GPs will save time and effort when sharing this important information.

In addition to measuring portfolio risk exposure, value creation, and Limited Partnership Agreement and side letter compliance, the PortCo Template now includes a voluntary returns template, a separate ESG template, an M&A activity section and a valuation section that allows for multiple methodologies. These additions were made in response to industry comments. ILPA CEO Steve Nelson commented on the importance of the collaborative process and promise of standardization:

“We at ILPA are especially grateful to the numerous individuals and organizations who provided input on this resource, as each added a unique perspective to capturing this important data set,” said Nelson. “We encourage LPs, GPs and portfolio companies to adopt the PortCo template and continue to provide ILPA with additional input on how best to evolve the tool.”

ILPA developed the PortCo Template with a working group of 30 organizations, including LPs, GPs, advisers and data service providers throughout 2018. Questions about the Template can be directed to standards@ilpa.org.

About the Institutional Limited Partners Association (ILPA)

The Institutional Limited Partners Association (ILPA) engages, empowers and connects limited partners to maximize their performance on an individual, institutional and collective basis. With more than 500 member institutions representing over \$2 trillion USD of private equity assets under management, ILPA is the only global organization dedicated exclusively to advancing the interests of LPs and their beneficiaries through best-in-class education, research, advocacy and events. For more information, please visit ILPA.org.

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