

PRIVATE EQUITY ANALYTICS

How a private equity firm replaced two-month reporting cycles with *real-time private equity analytics.*

How Brewster Consulting Group delivered end-to-end private equity analytics — Power BI dashboards, automated data ingestion, and auditable data lineage — helping VMG cut portfolio reporting time by 97%, from two months to two days.

CLIENT

**VMG—
Investment Firm**

ENGAGEMENT

**Power BI Dashboard
Development**

RESULT

**97% Reduction
in Reporting Time**

PRACTICE

**Private Equity
Analytics**

01 — THE CHALLENGE

A portfolio that outgrew its reporting — *until private equity analytics* changed everything.

VMG, a premier private equity investment firm focused on high-potential consumer and tech ventures, was experiencing a growing challenge: their portfolio had expanded, but their reporting systems had not. Without robust private equity analytics infrastructure, the team struggled to gain timely, accurate visibility into the performance of their investments — particularly in smaller, privately held companies with limited financial infrastructure.

VMG relied heavily on manual reporting via spreadsheets and SharePoint uploads — error-prone, difficult to audit, and slow. Portfolio performance reviews took up to two months to complete, limiting the firm's ability to respond quickly to changes in performance or market conditions.

WHERE THE DATA WAS BREAKING DOWN

Manual data wrangling

01 Analysts spent hours standardizing files and rechecking formulas — leaving little time for actual analysis.

Inefficient workflows

02 Every reporting cycle required extensive back-and-forth; updates took as long as 60 days to finalize.

No systemized data lineage

03 VMG lacked a clear trail of where numbers came from, eroding stakeholder confidence in reported figures.

Inconsistent data collection

04 Portfolio companies lacked formal financial systems, leading to irregular formats and fragmented submissions.

Delayed insights

05 Without real-time private equity analytics, VMG couldn't react quickly to performance fluctuations.

"VMG needed a private equity analytics partner who could transform an overwhelming, manual reporting process into a real-time decision-making asset — not another spreadsheet to maintain."

02 — OUR APPROACH

End-to-end *private equity analytics* — from disconnected spreadsheets to executive-ready dashboards.

Brewster Consulting Group designed and implemented a custom Power BI dashboarding solution tailored for VMG's consumer and tech investment portfolios — introducing structure, automation, and reliability without overhauling each portfolio company's systems.

THE PRIVATE EQUITY ANALYTICS SOLUTION WE BUILT

<p>→</p> <p>Centralized PE Analytics Dashboards</p> <p>Central Power BI environment aggregating metrics from all portfolio companies — executive summaries and analyst drill-downs.</p>	<p>→</p> <p>Integration Within Existing Constraints</p> <p>Semi-automated data ingestion built around VMG's SharePoint workflow, minimizing manual rework across all submissions.</p>
<p>→</p> <p>Auditable Data Lineage</p> <p>Full lineage across all metrics, with every figure traceable to its source. A critical requirement in any private equity analytics environment.</p>	<p>→</p> <p>Iterative Stakeholder Refinement</p> <p>Collaborative KPI and dashboard refinement with VMG's teams, aligning the solution with strategic and operational goals.</p>

03 — RESULTS

From labor-intensive reporting to insight-driven private equity analytics.

<p>97%</p> <p>Reporting Time Reduced</p> <p>Two months to two days — decision-making cycles accelerated dramatically.</p>	<p>2 Days</p> <p>Full Reporting Cycle</p> <p>Complete, validated portfolio reports delivered to VMG's team in under 48 hours.</p>
<p>100%</p> <p>Auditable Data Lineage</p> <p>Every metric traceable to its source, restoring full stakeholder confidence.</p>	<p>↑</p> <p>Analyst Productivity</p> <p>Less time cleaning data, more time on strategic analysis and portfolio support.</p>

LET'S BUILD YOUR ANALYTICS ENGINE

Looking for Private Equity Analytics that turn portfolio data into decisions?

Brewster Consulting Group empowers organizations through comprehensive private equity analytics, data management, process improvement, and project management. Whether you're starting with a spreadsheet or sitting on years of portfolio data, our private equity analytics team helps you unlock the value of your data with tailored, end-to-end solutions.

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Three ways our Private Equity Analytics services help

STAND UP

Build a private equity analytics foundation from scratch — Power BI, ETL, data modeling, and governance.

SCALE UP

Take an existing BI stack from fragile to enterprise-grade and self-serve across the full portfolio.

TUNE UP

Audit, optimize, and harden an existing Power BI or Tableau deployment so it actually drives private equity investment decisions.