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Executive Summary

Investera has delivered Investment Management System (IMS) implementations across multiple investment firms, family offices, and holding companies within the GCC and MENA region.

1. Al Kifah Holding (KSA)

Industry: Diversified Holding Group

Client Overview: Al Kifah Holding is a diversified holding group with investments across multiple sectors. As its investment portfolio expanded, the organization required a centralized solution to improve portfolio visibility, strengthen governance, and streamline investment reporting.

Scope: Investment portfolio management, performance tracking, reporting, and operational oversight. Investera implemented its Portfolio Management System (PMS) for Al Kifah Holding to centralize investment data and provide a single platform for monitoring portfolio performance. The solution enabled the client to consolidate investment information, automate reporting processes, and improve visibility across its investment portfolio while supporting governance and management oversight.

Investera continues to support Al Kifah Holding in managing its investment portfolio through a centralized PMS platform. The implementation provides management with timely portfolio insights, structured reporting, and role-based governance controls, enabling more informed investment decisions and improved operational efficiency.

Key Capabilities Delivered:

- Centralized investment data management
- Portfolio-level performance tracking
- Reporting dashboards and analytics
- Role-based access and governance controls
- Configurable workflows
- Portfolio performance reporting

Outcome: Improved transparency across investment activities, enhanced portfolio visibility, and reduced reliance on manual reporting processes. The centralized platform enabled more efficient investment monitoring, strengthened governance, and supported faster, data-driven decision-making.