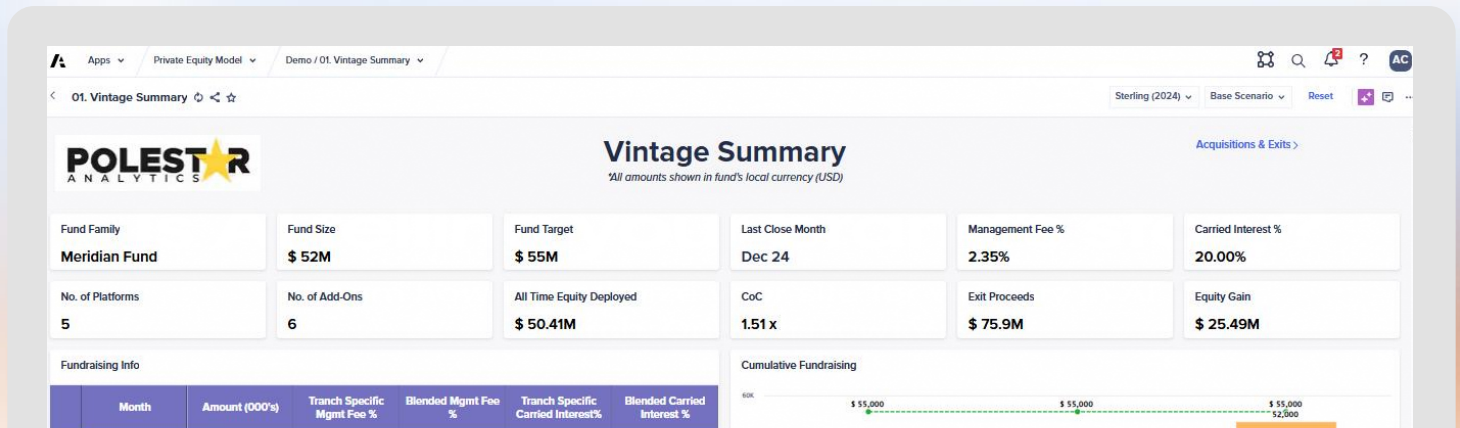


FUND TEAMS MOVE FAST. THEIR PLANNING MODELS OFTEN DON'T.

⚡ With **Private Equity Planning App**, they can!

Polestar Analytics' Private Equity Planning App unifies fund planning, capital allocation, acquisitions, exits, waterfall calculations, scenario modeling, and reporting into one connected platform enabling fund teams across Fund Admin, Fund Managers, Fund Accounting, Management Co. Finance, and Investor Relations to collaborate seamlessly, reduce manual effort, and make faster, more confident planning decisions.

CORE MODULES THAT HELP YOU WIN

Fund & Investment Structure

Unify fund groups, vintages, projects, deals, and supporting reference data in one connected hierarchy.

Acquisition & Exit Plan

Model close dates, equity, add-on investments, exit CoC, and see how every change impacts returns, carry, and Mgt Co. P&L.

Capital Commitments & Calls

Track LP commitments, capital calls, actuals, forecasts, and what-if call schedules without touching actual data.

Distribution & Waterfall

Automate multi-tier waterfalls across return of capital, preferred return, catch-up, carry, and LP/GP residuals.

Investment Performance Monitoring

Track Gross & Net IRR, TVPI, DPI, MOIC, valuations, realized proceeds, and portfolio performance across deal, vintage, fund, and firm level.

Forecasting & Scenario Analysis

Compare budget, forecast, and bespoke scenarios to see the impact on IRR, MOIC, capital calls, distributions, and liquidity gaps.

VALUE DELIVERED

Delivers real-time scenario comparisons that help teams maximize profitability and reduce risk exposure.

Provides an AI assistant that surfaces instant, decision-ready insights.

Improves cross-team collaboration to drive a 40% increase in end-to-end planning accuracy.

Cuts report generation time by 30%, freeing teams to focus on higher-value work.

Explore purpose-built planning solutions for private markets teams.

[Discover Polestar Analytics PE App](#)

CUSTOMER SUCCESS STORY: TRANSFORMING FUND PLANNING FOR A GLOBAL INVESTMENT FIRM

A global investment firm recognized for its leadership in private equity and flexible capital solutions was looking to accelerate growth and create lasting value. But their planning process was held back by slow forecast cycles, Excel-heavy budgeting, disconnected team views, and time-consuming reporting.

THE CHALLENGE

- Slow, manual forecast updates
- Heavy reliance on Excel for budgeting
- Fragmented views across teams
- Reporting that took too long to produce

THE SOLUTION

The firm adopted **Polestar Analytics' Private Equity Fund Planning App**, bringing fund planning, budgeting, reporting, and dashboards into a single connected model. This unified platform streamlined workflows, improved collaboration, and delivered real-time visibility across key fund metrics.

THE IMPACT

- **40% improvement** in budgeting accuracy
- **25% reduction** in budget preparation time
- **30% faster** report generation
- **Real-time visibility** into critical fund performance metrics

[See the PE App in action](#)

ANAPLAN POWERS THE PRIVATE EQUITY APP'S PLANNING FOUNDATION.

The App runs on Anaplan's Connected Planning Engine, leveraging Hyperblock calculations, role-based access, workflow checklists, and seamless integrations with ERP, fund admin, and GL systems.

ERP, Fund Admin & GL Data

Fund, investor, and transaction inputs



Anaplan Connected Planning Engine

Hyper-Block calculations and role-based access



Fund-Native Model Logic

Waterfalls, preferred returns, carry, and scenarios



Planning & Reporting Outputs

IRR, MOIC, investor statements, and board-ready reports



ABOUT POLESTAR ANALYTICS

Polestar Analytics is a globally recognized Analytics and AI firm trusted by enterprises across industries to turn fragmented data into confident decisions. Recognized by Gartner, Everest Group, ISG, and the Financial Times as a high-growth leader, Polestar brings deep expertise in planning, analytics, and financial services to every solution we deliver.

Our Private Equity Planning App is purpose-built to help PE firms move beyond disconnected spreadsheets and manual reporting enabling a fully connected planning model across the entire fund lifecycle.

[More about Polestar Analytics](#)