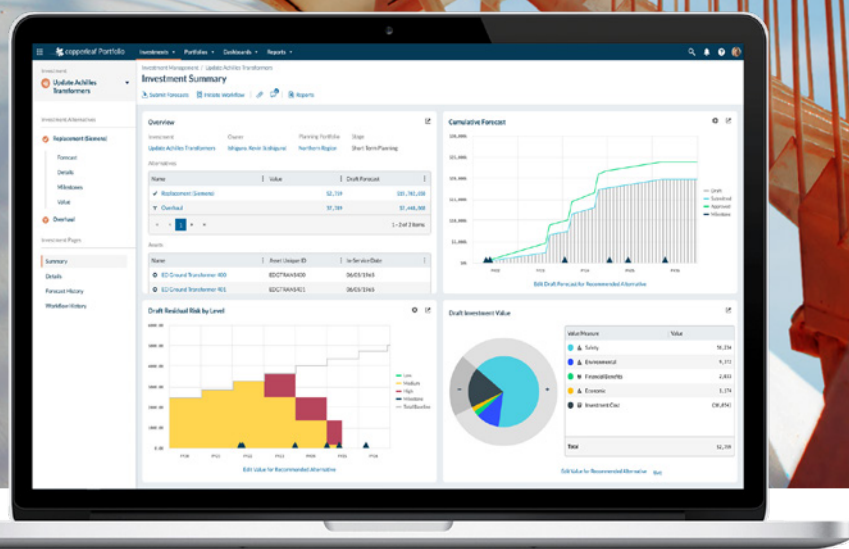




copperleaf Portfolio

Create the best possible investment plans

Businesses today are faced with unprecedented challenges. Climate change, ageing infrastructure, new technologies, digital transformation initiatives, and Environmental, Social, and Governance (ESG) commitments demand increased investment. However, budgets and resources are more limited than ever before. To thrive, companies must strike the right balance between cost-effectively managing the current business and investing for the future. These decisions are complex, balancing disparate factors such as safety, reliability, revenue growth, environmental impact, and social responsibility. How can you be confident and demonstrate you're making the best decisions—the ones that will deliver the greatest value?

Copperleaf Portfolio™ empowers organisations to efficiently create, manage, and communicate investment plans that deliver the greatest value while simultaneously respecting funding, resource, and timing constraints. **Portfolio's** AI-powered software provides streamlined investment capture and costing tools, multi-constraint optimisation capabilities, and a value-based decision-making framework that uses industry-

proven models from the Copperleaf® Value Model Library. Make the highest-value decisions and spend no more than necessary to drive optimal results across your entire organisation.



We spend \$1 billion dollars a year on thousands of different projects. Where Copperleaf has really helped us to add value is to look at our entire portfolio and understand what outcomes we can achieve. The biggest benefit is we found we can achieve the same outcomes for 10% less spend. That's been huge for us."

DAVID SMITH

Vice President, Business Planning & Performance
National Grid

Align decisions with your strategic objectives

The Copperleaf Value Framework makes it possible to consistently assess the value of every investment and make decisions that drive the strategic priorities of your organisation. Any number of value measures can be added, including financial and non-financial benefits, risks, service measures, KPIs, and Environmental, Social, and Governance (ESG) factors. **Portfolio** evaluates how an investment contributes to each value measure and aligns that value to a common economic scale. Even the most dissimilar investments can be compared so that difficult trade-off decisions can be made with confidence.

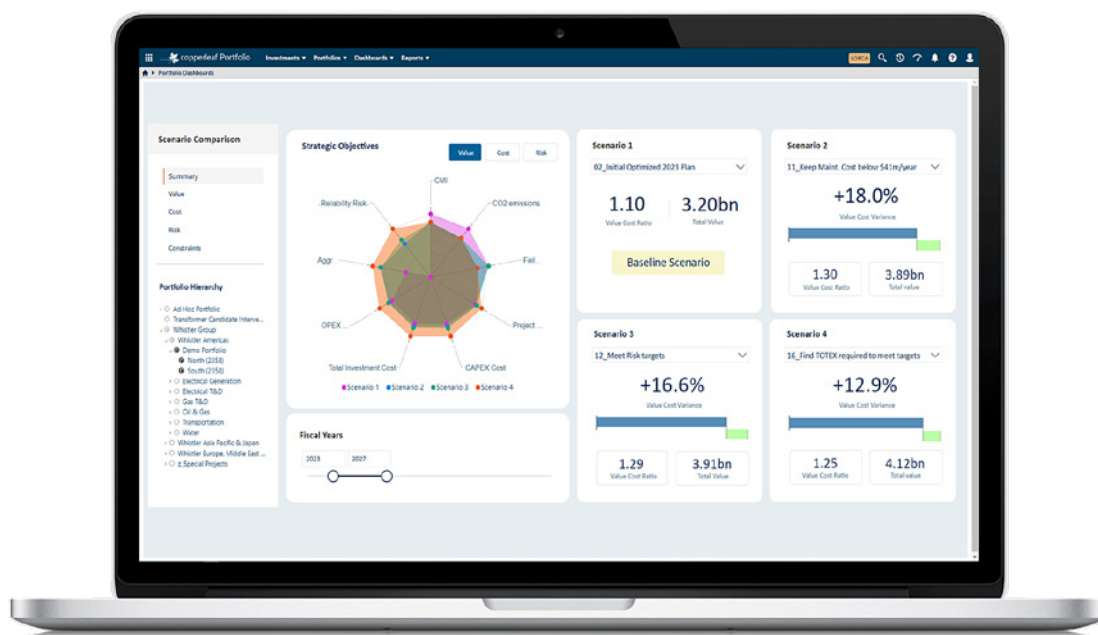
Create the optimal investment plan

Delivering the highest value means doing the right projects at the right time. This is no easy task for organisations that deal with hundreds of candidate investments, with multiple alternatives and start dates to consider. Finding the optimal solution is impossible using traditional methods, such as spreadsheets or stand-alone tools.

Copperleaf's AI-powered optimisation can evaluate the vast number of possibilities and identify the highest-value investment plan within minutes. Create any number of what-if scenarios to compare and contrast the impact of different funding and resource constraints on value and risk. **Copperleaf Portfolio** helps stakeholders quickly come to agreement on the best overall investment plan and track progress toward achieving strategic goals and KPIs.

Manage risk & value effectively

Copperleaf Portfolio enables organisations to develop comprehensive and up-to-date plans to ensure ongoing performance and reliability, and deliver on your company's strategic objectives. Any number of risk types can be specified and modelled, including safety, environmental, lost revenue, reputation, etc., making it easy to understand the different types and levels of risk associated with each investment plan being considered. **Portfolio** provides visibility into how value and risk change over time and the impact project deferrals have on the value of your investment plan.



Create what-if scenarios to explore multiple versions of your plan. Rich reporting tools and dashboards make it easy to visually compare and contrast the value, timing, risks, and costs of different investment strategies to build a robust, defensible plan.

Improve the efficiency & effectiveness of your planning processes

Copperleaf Portfolio streamlines the process of developing, approving, and managing investments through their full lifecycle. It provides a centralised, enterprise-wide platform to capture all candidate investments, allowing them to be scoped, costed, valued, and organised into portfolios. Optimise Ready uses machine learning to highlight data quality issues so that users can quickly view the information and fix any inconsistencies prior to optimisation.

Investment portfolios can then be optimised to maximise value and drive strategic outcomes, while respecting multiple operating constraints. Sensitivity analyses can easily be performed to explore various investment strategies, build consensus, and accelerate the decision-making process.

Portfolio ensures all investment decisions are based on “one source of the truth”, enabling planning teams and other stakeholders to operate more efficiently and collaboratively as projects evolve from idea to execution. Built-in self-serve analytics make dashboard creation and data reporting efficient and accessible, providing stakeholders with real-time access to the most current data for transparent decision making across organisational boundaries.

Increase business agility

Business environments are constantly evolving—requiring organisations to adapt while continuing to deliver on commitments to customers and shareholders. A capital plan that was approved three months ago may require significant changes due to unforeseen circumstances. **Copperleaf Portfolio** enables a continuous planning process by highlighting variances between planned and actual performance. No matter what twists and turns arise during execution, **Portfolio** provides the ability to re-optimize plans, communicate and defend any changes to stakeholders, and adapt quickly to maintain optimal business performance.

Copperleaf Decision Analytics

Copperleaf’s AI-powered decision analytics solutions help many of the world’s leading asset-intensive organisations decide where and when to invest in their businesses to maximise capital efficiency, meet performance targets, manage risk, and achieve their ESG and financial goals.

Each product within the suite is highly configurable, and interfaces with EAM, APM, ERP, GIS, and a variety of other systems—empowering organisations to connect disjointed data, and bring rigour, discipline, and transparency to the decision-making process.

Together, **Copperleaf Portfolio**, **Copperleaf Asset™**, and **Copperleaf Value™** provide a comprehensive enterprise decision analytics solution.

Every Copperleaf client has recovered their investment within their first planning cycle—and every organisation that has implemented our solution continues to use it successfully today.



Copperleaf Portfolio Options

Copperleaf Portfolio is a highly configurable enterprise software solution that can integrate seamlessly into the fabric of your IT environment. Additional options can be implemented to expand functionality over time, so that you can focus initially on the areas of your business that will provide immediate return—and add capabilities that will deliver more value in the future.

Asset Aware Investments	• Define and analyse the impact an investment will have on the risk or condition of a particular asset • Accelerate investment entry by connecting assets to their investments
Copperleaf Connect	• Integrate Copperleaf Portfolio with existing third-party systems using a bidirectional Application Programming Interface (API)
Interactive GIS Experience	• Visualise predictive analytics results using a map-based interface to improve asset sustainment decisions • Use a geometric project area to select and manage assets on a map and understand the location and impact of investments
Outage Optimisation	• Define the planned outage schedule for assets and Copperleaf Portfolio will automatically shift the timing of projects to align with outage dates
Performance Prediction	• Gain accurate insights into the expected costs, benefits, and risks mitigated by capital plans • Leverage machine learning to understand how likely a plan will be to consume resources and deliver the expected outcomes
Risk Manager	• Identify, assess and manage risks across the entire enterprise, providing a holistic view of your organization's risk profile • Utilize advanced analytics and modeling techniques to quantitatively analyze risks to allow for the development of effective risk mitigation strategies
Unit Cost Models	• Generate consistent and accurate class 5 estimates to increase project execution success • Save time creating investments and obtaining initial cost estimates



Copperleaf (TSX:CPLF) provides enterprise decision analytics software solutions to companies managing critical infrastructure. We leverage operational and financial data to empower our clients to make investment decisions that deliver the highest business value. What sets us apart is our industry-leading products and our commitment to providing extraordinary experiences, shaped by people who care deeply and partnerships that stand the test of time. Copperleaf is actively involved in shaping and implementing global industry standards and sustainability principles through our participation in the United Nations Global Compact, the Institute of Asset Management, and other organizations. Headquartered in Vancouver, Canada, our solutions are distributed and supported by regional staff and partners worldwide. Together, we are transforming how the world sees value.

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