

IFS Copperleaf Portfolio

Create the best possible investment plans



| IFS Copperleaf

Every investment is under scrutiny. In today's high-stakes environment, leaders of asset-intensive organizations must navigate a complex mix of demands: aging infrastructure, climate volatility, digital transformation, and intensifying expectations around Environmental, Social, and Governance (ESG) performance. Yet while investment needs continue to grow, budgets and resources remain constrained. Traditional planning tools—like spreadsheets or siloed systems—are no longer sufficient. The risks of underperformance, missed opportunities, and stranded capital are too high.

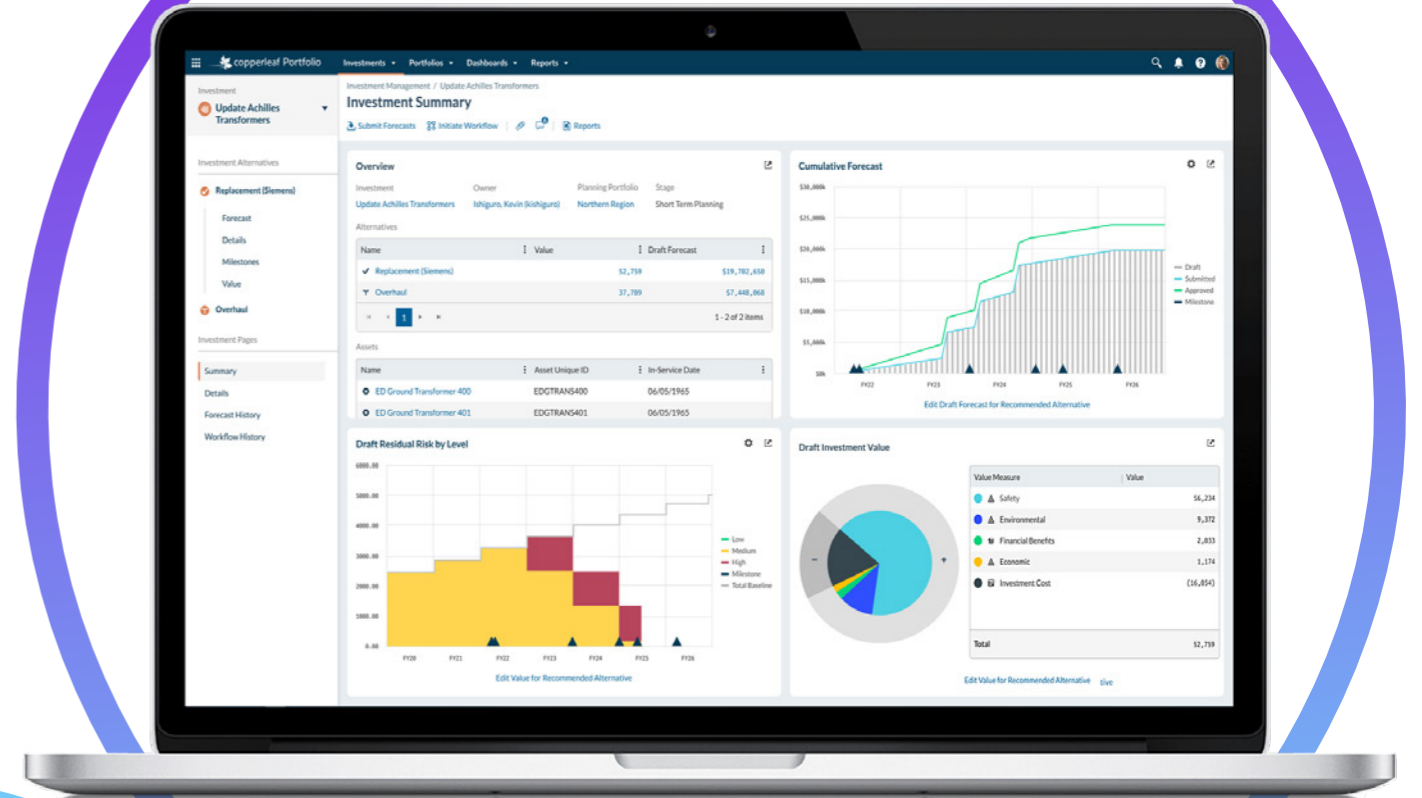
IFS Copperleaf Portfolio™ empowers organizations to build investment plans that are optimized for strategic value, defensible to stakeholders, and adaptable to real-world constraints. At the core of the solution is the IFS Copperleaf Value Framework, which enables every decision to be evaluated against a consistent definition of value—spanning financial outcomes, risk mitigation, service levels, and ESG goals.

Organizations can draw from the IFS Copperleaf Value Model Library, a out-of-the-box collection of industry-proven models, to quantify the impact of each investment and make confident trade-offs across even the most dissimilar projects. The result: capital is allocated where it delivers the greatest return—on business performance, compliance, and long-term resilience.



We spend \$1 billion dollars a year on thousands of different projects. Where IFS 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 IFS Copperleaf Value Framework makes it possible to consistently assess the value of every investment and make decisions that drive the strategic priorities of your organization. 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

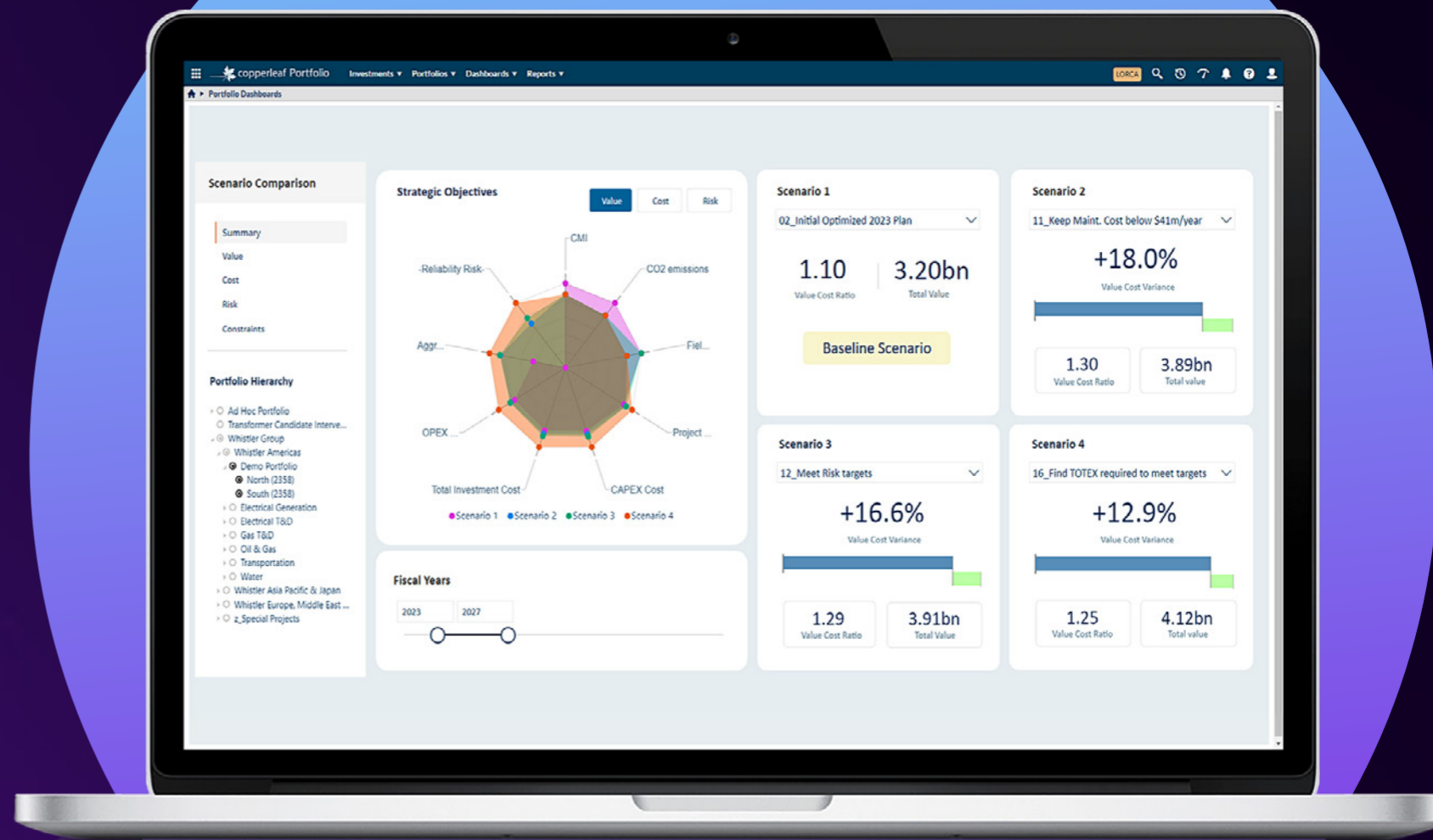
Delivering the highest value means doing the right projects at the right time. This is no easy task for organizations that deal with hundreds of candidate investments, with multiple alternatives and start dates to consider. Finding the optimal solution is impossible using traditional methods, such as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

Only IFS Copperleaf offers enterprise-grade multi-constraint optimization built specifically for high-stakes capital planning. In minutes, simulate millions of funding paths to identify the investment mix that delivers the highest value across cost, risk, and performance—while meeting every business constraint. IFS 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

IFS Copperleaf Portfolio enables organizations 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 modeled, 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

IFS Copperleaf Portfolio streamlines the process of developing, approving, and managing investments through their full lifecycle. It provides a centralized, enterprise-wide platform to capture all candidate investments, allowing them to be scoped, costed, valued, and organized into portfolios. Foresight, the consolidated AI layer within Portfolio and the rest of the IFS Copperleaf suite, delivers intelligent analysis, assistance, and insights to enhance planning efficiency, business case quality, and user experience. Using machine learning, Foresight can highlight data quality issues so that users can quickly view the information and fix any inconsistencies prior to optimization.

Investment portfolios can then be optimized to maximize 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 organizational boundaries.

Increase business agility

Business environments are constantly evolving—requiring organizations 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. IFS 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.

About IFS Copperleaf

IFS Copperleaf’s AI-powered decision analytics solution helps the world’s leading organizations decide where and when to invest in their businesses to **maximize 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 organizations to connect disjointed data and bring rigor, discipline, and transparency to the decision-making process.

Together, **IFS Copperleaf Asset, IFS Copperleaf Portfolio, and IFS Copperleaf Value™** create a comprehensive enterprise Asset Investment Planning (AIP) solution.

IFS Copperleaf’s client retention is world-class, and every client has recovered their investment within their first planning cycle.



IFS Copperleaf Portfolio Options

IFS 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.

AIP Copilot Investment Reviewer	<ul style="list-style-type: none"> Utilize configurable AI prompts to review investments and be provided recommendations for their improvement Reduce the time and effort required to create high-quality business cases
Asset Aware Investments	<ul style="list-style-type: none"> Define and analyze the impact an investment will have on the risk or condition of a particular asset Accelerate investment entry by connecting assets to their investments
IFS Copperleaf Connect	<ul style="list-style-type: none"> Integrate IFS Copperleaf Portfolio with existing third-party systems using a bidirectional Application Programming Interface (API)
Guided Investment Management	<ul style="list-style-type: none"> Utilize tailored user interfaces to easily create and edit investments throughout their lifecycle with minimal training Minimize rework during the planning cycle by ensuring investments are of high quality
Interactive GIS Experience	<ul style="list-style-type: none"> Geospatially visualize the results of your scenarios and what-if analysis to understand, communicate, and defend your capital plans Intuitively select assets on the map to define the scope of new and existing investments
Outage Optimization	<ul style="list-style-type: none"> Define the planned outage schedule for assets and IFS Copperleaf Portfolio will automatically shift the timing of projects to align with outage dates
Performance Prediction	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Generate consistent and accurate class 5 estimates to increase project execution success Save time creating investments and obtaining initial cost estimates

About IFS



IFS is the world's leading provider of Industrial AI and enterprise software for hardcore businesses that service, power, and protect our planet. Our technology enables businesses which manufacture goods, maintain complex assets, and manage service-focused operations to unlock the transformative power of Industrial AI™ to enhance productivity, efficiency, and sustainability.

Within our single platform, our industry specific products are innately connected to a single data model and use embedded digital innovation so that our customers can be their best when it really matters to their customers – at the Moment of Service™.

The industry expertise of our people and of our growing ecosystem, together with a commitment to deliver value at every single step, has made IFS a recognized leader and the most recommended supplier in our sector. Our global team of over 7,000 employees every day live our values of agility, trustworthiness, grit and collaboration in how we support thousands of customers.

Learn more about how our enterprise software solutions can help your business today at ifs.com.

#MomentOfService