

Premier Portfolio

What do you stand to gain? In addition to streamlining your daily investment to-do list, you'll enjoy greater flexibility, invaluable tools, convenient educational content and increased confidence in the portfolio decisions you make.

- Investment decisions should not be a guessing game. With Premier Portfolio's What-If Analyzer, you can perform pre- and post-purchase analyses to determine if a certain security is the right match for your portfolio.
- Now with more options than ever before, you can easily view current security offerings and highlighted specials, and place buy orders from anywhere. Choose from Bank Notes Callable, SBA Pools, Corporate Bonds, CMBS Pools and more.*
- Connect directly to the SimpliCD system or Alloya's Loan Participation Platform to explore the investment vehicles available in the CD market or the loan participation marketplace.
- With a click, you can view and export current investment holdings, key accounting and investment portfolio reports, monthly statements, trade confirms, market analyses, and more.
- Get the information you need, fast, and in a variety of formats – ranging from written publications to videos to webinars and more. We track market and economic trends, analyze key releases and watch ongoing political developments, then share our findings in Premier Portfolio so you can quickly determine the impacts of current events on your credit union.

Save Time and Reduce Effort

Streamline your investment to-do list from start to finish through a secure, online system.

Enhance Effectiveness

The What-If Analyzer provides the transparency you need to execute an investment decision with confidence.

Find Peace of Mind

Our team of investment professionals are only a phone call away when in need of additional investment support or guidance.



Drop your doubts!

Trade with confidence using Premier Portfolio's new What-If Analyzer.

Take a peek.

What you gain...

- Streamlined investment management
- More investment options
- Powerful pre- and post-purchase analytics
- Timely and convenient educational content
- Greater confidence in your investment decisions