




Benchmarking


A benchmark is a standard against which the performance of the investment portfolio of the balance sheet can be measured. Since credit unions' risk limits are bound by the liabilities currently on the balance sheet, Benchmarking measures the limits against the current interest rate risk (IRR) of the balance sheet and optimizes the exposure. The benchmark is mathematically derived, and can be used to measure any portfolio, investment, loan, or liability.


Benchmarking helps CEOs, CFOs, and other credit union leaders define optimal investment strategies for their credit union. It enables them to identify where investment decisions lead, lag, or remain at par with optimal portfolio performance.

Key Benefits

1. Create performance targets specific to your unique goals.
2. Develop portfolio strategies that provide optimum levels of return with a given level of IRR.
3. Identify where investment decisions lead, lag, or remain at par with optimal portfolio performance.
4. Meet or exceed your benchmarks with flying colors.

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