



Loan &
Securitized
Asset
Advisory

ASSET MANAGEMENT ADVISORY

Investing in Residential and Commercial Mortgages, Consumer and Business Loans, Asset Backed Securities (“ABS”), Commercial Mortgage Backed Securities (“CMBS”), and Collateralized Debt Obligations (“CDOs”) is complex and requires specialized knowledge. At CapitalFusion, our concentrated proficiency in these various markets enables us to offer insightful research, analysis, and strategy recommendations for all types of asset managers.

The CapitalFusion team has a combined expertise that covers nearly the full range of elements within the loan and securitized asset market. This enables us to sensibly analyze individual assets and market opportunities according to a multi-level view that spans credit underwriting, structure, market landscape, all the way through to economic influences.

What We Do

- We help investors in loans, structured securities, and the equity of institutions that originate or invest in these types of assets to develop and execute disciplined portfolio strategies.
- Evaluate and develop investment strategies based on fundamental credit analysis of collateral and counterparties, sector analysis, macroeconomic assessment, technical marketplace conditions, available financing options, quantitative and qualitative peer benchmarking, and risk adjusted return profiles.
- Perform sector/security specific research and analysis focusing on investment opportunities, critical risk factors, and short and long term outlooks.
- Develop or assess vital components of the broader asset management strategy including independent portfolio risk measures and controls, hedging requirements and capabilities, back and middle office technology requirements and capabilities, and appropriate analytical tools.

Our Expertise

The hallmark of the CapitalFusion team is its comprehensive scope of expertise. Our team members have worked at Wall Street firms, OCC regulated banks, hedge funds, and finance companies. They have held senior positions as investment managers, traders, risk managers, research analysts, and structurers. Our team has expertise in a wide range of financial assets and their associated derivatives. We are knowledgeable across the curve from loan origination and credit to the secondary and capital markets. With this extensive capability we can fully assess the opportunities and risks in the markets we cover and help clients invest soundly.



CAPITALFUSION

PARTNERS

About Us

CapitalFusion is a minority owned financial services consultancy focused on providing innovative, practical, and executable business strategies that capitalize on evolving market trends and dynamics.

We primarily work with financial services firms and financial technology enterprises, throughout the Americas, Europe, and Asia.

Our experience has shown us that the success of any strategy hinges on its effective and efficient execution. We work closely with senior managers to ensure that goals are realistically established. At the completion of projects, we provide not only a fully implemented business strategy but also a road map for future growth.

Management Team

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Contact Us To Discuss Your Firm's Specific Needs and How CapitalFusion's Team Can Help

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