Quantarium

PRODUCT SHEET

PORTFOLIO INTELLIGENCE FOR LENDERS & SERVICERS

Portfolio Analytics Services

Protect Your Portfolio. Identify Opportunities. Recapture More Business.

Borrowers in your portfolio refinance with competitors, list their homes, or get targeted with HELOC and cash-out offers, often before your team knows they're in play. Quantarium Portfolio Analytics Services provides portfolio managers, risk teams, and servicing leadership with continuous visibility into what's happening across their loan book, so retention and cross-sell teams can act on opportunities rather than finding out after the loan is already gone.

KEY VALUE

Protect what you've built. Property, mortgage, and ownership data turned into actionable insights — retention, recapture, cross-sell, and future lending opportunities are surfaced weekly across your entire portfolio.

Your loan book, one week of signals

ILLUSTRATIVE · 168 LOANS



Each square is one loan. Colored squares were flagged this week; see the legend below.

WHY LENDERS CHOOSE PORTFOLIO ANALYTICS SERVICES

- **Retention** — Identify mortgage, property, and ownership activity that may signal a retention opportunity before the relationship is lost.
- **Recapture** — Understand what happened after payoff — refinance, sale, move, or outside financing — and win the next loan.
- **Cross-Sell** — Surface customers whose property, mortgage, equity, or ownership profile may support additional lending.
- **Risk Analysis** — Track new liens, ownership transfers, and title changes across the book.
- **On-market alerts** — Know when a portfolio property shows on-market activity, not after it's already sold.
- **Delivered where your data lives** — Automated drops to S3, SFTP or Quantarium's on-demand web portal.

CROSS-SELL SIGNALS: HELOC | Cash-out refinance | Second mortgage | Purchase financing

PROOF

Trusted valuations, trusted data. Every insight is grounded in Quantarium's industry-leading valuation technology (QVM) — the AVM engine ranked #1 for accuracy and hit rate — so your team can act on it with confidence.

Put Quantarium to the test.

Request a Portfolio Review — see what we find on a sample of up to 5% of your portfolio, free.

discover@quantarium.com · quantarium.com · 424-210-8847, option 1

Talk to a Portfolio Expert

© 2026 Quantarium Group, LLC. All rights reserved.