

# THE Commercial Real Estate Platform for Lending & Asset Management

## Your Comprehensive CRE SaaS Solution

Rockport CORE is an enterprise-grade, CRE-dedicated cloud-based (SaaS) platform. Trusted by CRE Lenders, including top Banks & Life Cos, B Piece Buyers, Funds, and Rating Agencies, CORE supports the lifecycle of CRE lending - spanning loan origination, pipeline management, underwriting, securitization, asset management, and portfolio management- and provides reporting for every phase of the process.

## Why Rockport CORE?

**1**

### CRE Creds

Developed by industry leader Rick Trepp, Founder of Trepp®, and staffed with seasoned professionals with dual expertise in CRE and FinTech, RockportCORE is made by CRE experts for CRE experts. Rockport has been in business for over 21 years.

**2**

### Centralized Cloud-Based System

CORE is your 'single source of truth' for reporting & mining your data. Replace multiple systems and vendors with one best-in-class system.

**3**

### Proven Performance

Over \$1.5 trillion in loans actively managed in the platform.

**4**

### Partnerships, Not Transactions

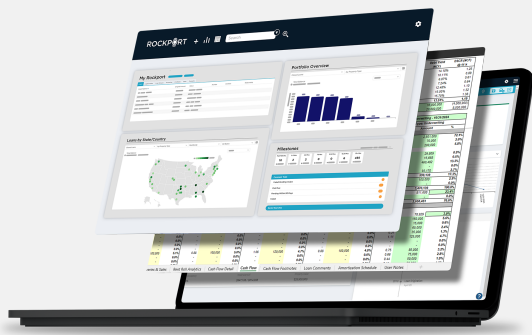
Rockport thinks of our clients as partners. We want the relationship to last decades, so we treat you like it - just ask our clients!

# CORE Key Components



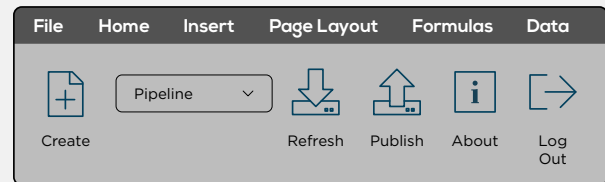
## Dashboards

The Interactive HOME DASHBOARD puts key information at your fingertips. The flexible, customizable screen provides compelling visuals and click-through widgets to detailed data, exports & reports.



## Loan Origination & Pipeline Tracking

CORE features a unique, integrated Excel Pipeline Tool for live batch updates during the pipeline meeting. A comprehensive suite of standard reports includes Pipeline & Portfolio Stratifications, Hit Rate, Broker Production, Borrower Exposures, Exec Summary, Loan Closing Schedule, and more. An integrated Excel Settlement Sheet makes tracking Closing Information a breeze.



## Asset Management/ Portfolio Management

CORE captures updated rent rolls and property financials as well as interfaces with Rockport ACT (or other third-party accounting/servicing systems) to update loan payments, rate changes, and other credit events.

The system contains modules to track Draws & Releases and Covenant Tests with dedicated reporting.

Reports at the individual property level and portfolio level help to identify & manage risk across the portfolio, i.e., Tenant Exposure, Maturity Projection, Trend Analysis, Borrower/Sponsor Exposures, Loan Summary, Business Plan, Disposition Status, Draw Tracking, Lease Chages, and Portfolio (payment) Performance.

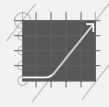


## Integrated Excel-Based UW

Only CORE has an Integrated Excel-Underwriting Model with a 2-way integration, providing a seamless synchronization to & from. The model is adept at sizing as well as asset management, expanding to capture updated rent rolls & operating statements over the life of a deal.

Married to your UW Model? The Rockport Team is adept at integrating clients' proprietary Excel models with CORE. Rockport doesn't make you choose between running your analysis in Excel and leveraging the power of the database for reporting.

# CORE Key Components



## Reporting

CORE's Reporting Module provides on-demand access to information: A library of > 75 standard reports spans origination, underwriting, securitization, and asset/portfolio management.

**The Ad-Hoc report writer** gives users the ability to write their own database queries on-the-fly - providing immediate answers to exposures, i.e., storm exposure. Rockport customizes standard reports and replicates clients' internal reports. Rockport's Tableau interface provides clients with customized, interactive, visual representations of their portfolios. And, Rockport reports can be scheduled to run/publish/auto-send, freeing users from repetitive report-generation/emailing.



## Securitization Module

Create pools and run pool stratifications & concentrations. View loans in multiple pools simultaneously to optimize pool composition. Run an ASR for each underlying deal. CORE is adept at creating rating agency tapes and can customize 2-way tapes to make batch updates via Excel.



## Configurability

While all clients are on the same CORE platform, CORE is built to be configured to each client's preferences, which includes fields/datasets, customization of screens and reports, and integrations - none of which require custom build-out.



## Centralized, Cloud-Based System

CORE is based on a 4,000+ field framework (+ client-defined fields), Excel integrations, a library of standard reports, Ad-Hoc report writer, all in a user-friendly interface; accessible from anywhere. Add space before 'Integrations' Integrations with Rockport's 'VAL' and 'ACT/Ag' platforms as well as Clients' internal/external systems and proprietary models means data flows between systems, eliminating duplicate data input and ensuring data integrity.



## Security

CORE is SOC certified (as are all Rockport platforms) - and is securely hosted. An on-screen audit trail tracks the full history of every field in the system, ensuring transparency and data traceability.



## Data Policy

Your data is YOUR data. Rockport does not sell clients' data nor use it to train AI or benchmark.  
Read our data policy here: [Rockport Data Pledge](#)