Dynamo v3.0 for Real Estate Investors

The Operating Platform Behind Every Real Estate Investment Decision

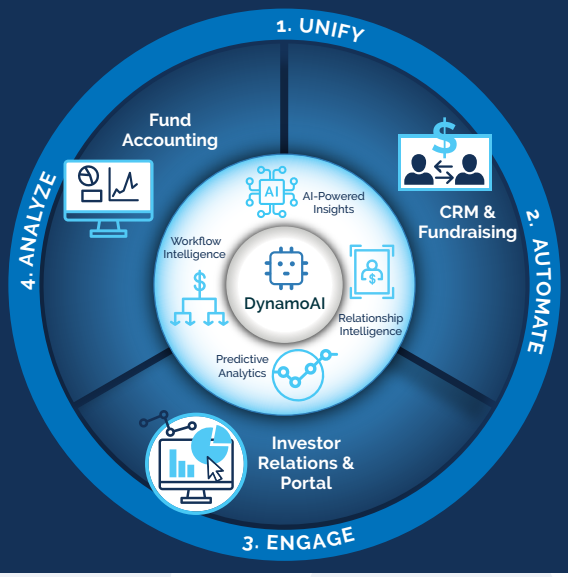
Dynamo v3.0 for Real Estate is an integrated, AI-powered platform designed to transform how real estate firms raise capital, manage investor relationships, and handle complex fund accounting. Dynamo provides an all-in-one platform serving as a single source of truth — eliminating data silos between teams, providing fast and efficient insights on-demand, while adapting to unique investment workflows needs.

Built for the Full Lifecycle of Real Estate Investment Management

- **One Platform, One Source of Truth**
  CRM, Fundraising, Investor Relations, Investor Portal, and Fund Accounting data in one system.
- **Configurable to Your Firm**
  Flexible workflows, structures, reporting, and financial data models.
- **Intelligence Embedded**
  AI-driven tools designed to surface relationship insights and automate data capture.
- **Built in Real Estate, for Real Estate**
  Tailored specifically for the needs of Real Estate General Partners (GPs), Dynamo leverages 25+ years of experience in alternatives and insights from working with thousands of clients.

Integrated Real Estate Investment Platform

Seamlessly Connecting First Contact to Quarterly Reporting



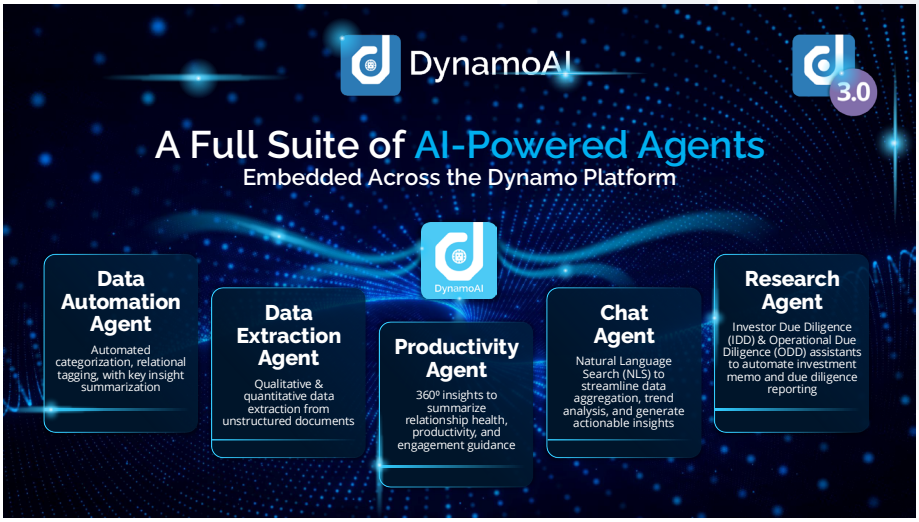
UNIFY
Effortlessly centralize investor data, contacts, commitments, & documents in one secure hub.

AUTOMATE
Streamline mass mailings, capital calls, performance metrics, & quarterly reports in just minutes.

ENGAGE
Impress investors with a branded, secure portal for onboarding, document sharing, & self-service.

ANALYZE
Gain insights, track engagement, & drive smarter decisions with real-time data.

The Power of Unified Intelligence for a Performance Edge



DynamoAI is natively embedded within the Dynamo v3.0 investment management platform, working directly alongside your proprietary data and workflows. Unlike point solutions that produce isolated outputs, DynamoAI delivers end-to-end intelligence across research, diligence, portfolio construction, monitoring, and reporting.

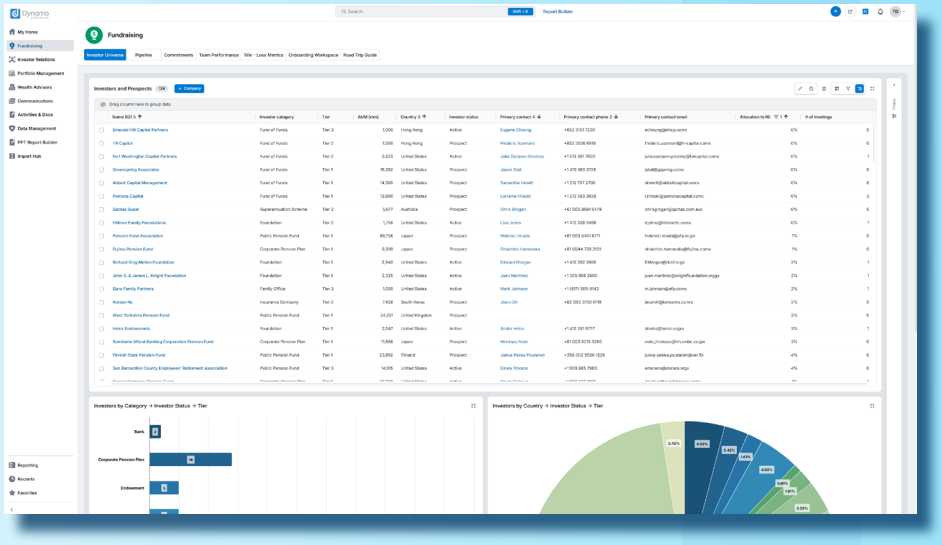
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CRM & Fundraising

Close Deals Faster with Integrated Relationship Intelligence

Connected Pipeline & Relationship Tracking

- End-to-end pipeline tracking for fundraising and acquisition performance analysis.
- DynamoAI-powered relationship intelligence across emails, meetings, and notes.
- Engagement scoring and dynamic list-building to prioritize high-intent investors.
- Native Outlook integration tools to capture emails, attachments, contacts, meetings, and tasks directly.
- Third-party data source integrations such as Preqin, Dakota, Bloomberg, and PitchBook.



Scalable Investor Communications

- Communications Hub to manage and track all prospects and investors.
- Send branded investor communications within minutes to segmented investor and prospect lists.
- Automated reporting to ensure the right data reaches the right investors on time.
- Dynamic smart lists with tailored engagement scoring, based on investor behavior, preferences, and interactions to identify high-interest investors.

Chat Agent

Native Language Search (NLS) to streamline data aggregation, trend analysis, and generate actionable insights

Turn Questions into Action: DynamoAI Delivers Instant Fundraising Insights

Ask your DynamoAI Chat Agent:

"Which Fund II Investors haven't re-upped for Fund III yet?"

and get an instant, ranked list with engagement signals and commitment history — **instantly transforming relationship data into fundraising momentum.**

Dynamo Blueprint

Start with Confidence. Deployed for Speed. Designed to Evolve with You.

The Dynamo Blueprint provides preconfigured hubs, workflows, and reports built around real estate best practices — so you don't have to start from scratch. Every Blueprint component is fully configurable, giving your team a proven foundation while preserving the flexibility to tailor Dynamo to your firm's strategies, structures, and processes.

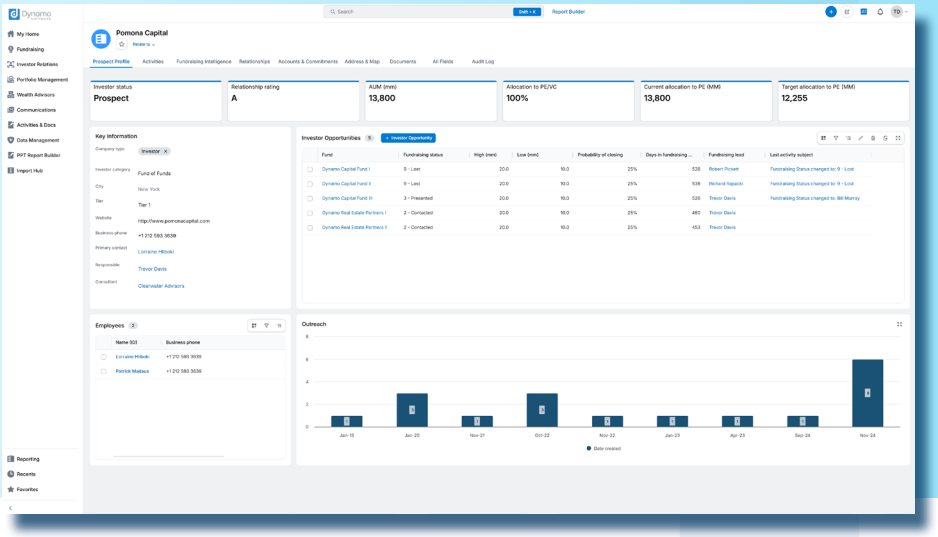
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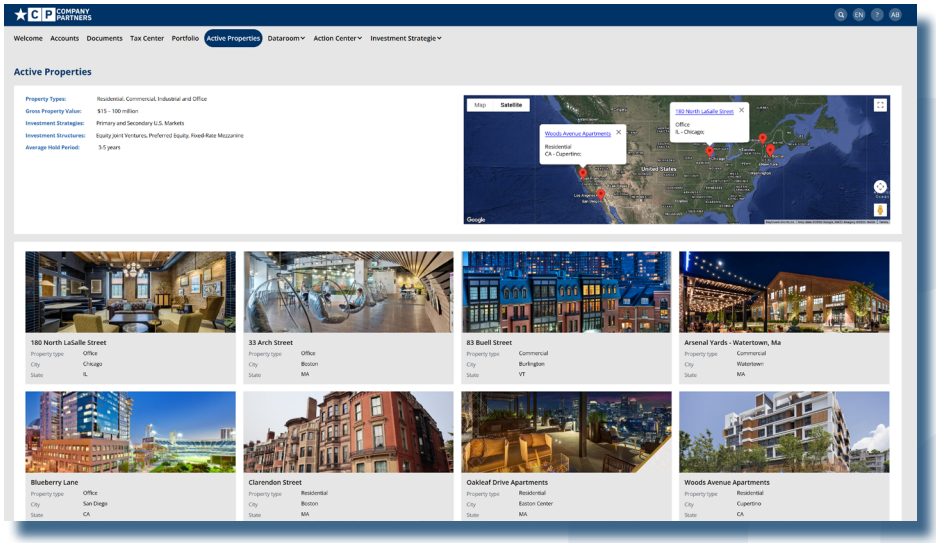
Investor Relations & Investor Portal

Strengthen Relationships, Streamline Communication

Investor Relationship Management

- 360˚ investor views spanning communications, exposure, and history.
- Native data structure designed to track parent investors and their underlying accounts.
- Organize investors by fund, strategy, geography, and commitment level with dynamic relational tags.
- Identify high-potential and at-risk investors using commitment history and engagement trends.





Investor Portal

- Fully branded, natively integrated, secure Investor Portal that reflects your firm's identity.
- Configurable interface empowers you to serve the unique needs of your investors.
- Enhanced filters, categorization, and two-way secure document sharing.
- Dedicated Tax Document Hub for simplified investor access to K-1s and related forms.
- Digital subscriptions, onboarding, and document execution via DocuSign.
- Automated capital calls and distribution notices with verified, auditable workflows.

Performance Tracking & Reporting

- Integrate performance data with Dynamo's Fund Admin Import Widget or manage allocation directly with Dynamo Accounting.
- Automate and analyze key metrics such as DPI, TVPI, IRR, and Net IRR.
- Report on performance at Portfolio, Fund, Investor Account and Parent Investor levels.
- Presentation-ready reports are built with multi-entity data enabling efficient, configurable, audit-ready insights.

Productivity Agent

360º insights to summarize relationship health, productivity, and engagement guidance

Precision Outreach Made Easy with DynamoAI

The DynamoAI Productivity Agent analyzes engagement across every investor touchpoint and auto-segments your investor base by interest, activity, and intent — **turning all communications into precision outreach strategy.**

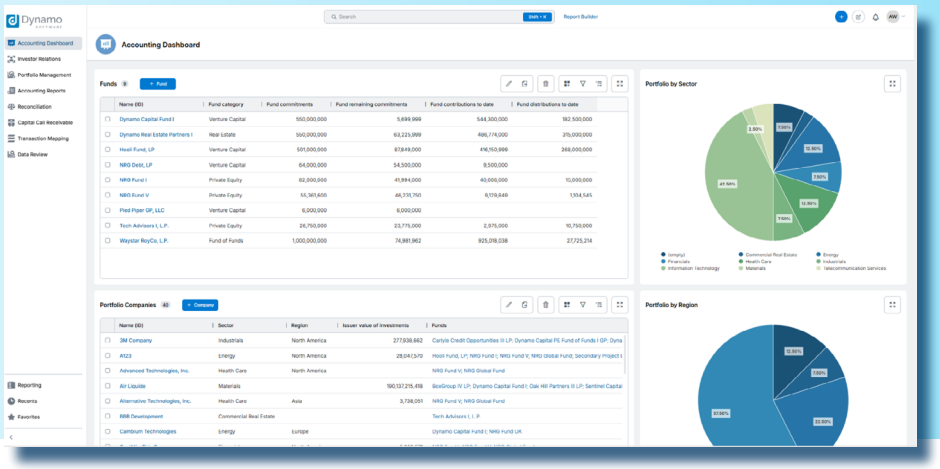
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Fund Accounting

Transform Capital Calls, Distributions, and Waterfalls into Investor-Ready Reporting

Robust Financial Foundation

- Cloud-native General Ledger with multi-entity, multi-currency support.
- Configurable chart of accounts, journals, and reporting templates.
- Automated partnership allocations, waterfalls, and carried interest calculations.
- Real-time visibility into trial balances, capital accounts, and performance.
- Investor hierarchies and capital account structures align directly with CRM and portal permissions for consistent investor reporting.



Automated Financial Reporting

- 70+ out-of-the-box, audit-ready reports aligned with US GAAP, ILPA, and Invest Europe.
- Excel-native reporting connected directly to the GL.
- Investor-ready financials published directly to the Investor Portal.
- Statements of net assets, operations, cash flows, changes in partners' capital, and the schedule of portfolio investments.

A Scalable Back Office Foundation

- IR teams can quickly access accurate financial data, enabling them to dedicate more time to building strong relationships. Standardized reporting across funds and vintages to improve clarity.
- Performance inputs such as IRR, DPI, and TVPI that remain consistent across accounting, dashboards, and investor materials.

Data Extraction Agent

Qualitative & quantitative data extraction from unstructured documents

Close Quarter-End Fast with DynamoAI

The DynamoAI Data Extraction Agent seamlessly extracts transaction data, NAV, and allocation metrics from statements, accurately maps them to the correct investor accounts, and prepares them for review before posting — **accelerating quarter-end close with zero manual data entry and enabling faster, more efficient reporting.**

Ready to Transform Your Real Estate Investment Operations?

See how Dynamo v3.0 for Real Estate can centralize your teams, simplify reporting, and give your investors a seamless experience across every fund and property in your portfolio.

Request a Demo

About Dynamo Software, Inc.

Dynamo Software is the leading end-to-end, AI-powered platform for alternative investment management. We centralize, streamline, and automate front-to-back-office investment operations for both General and Limited Partners. Trusted by over 1,000 global clients managing more than $10T in AUM, Dynamo supports the full investment lifecycle within a single, secure platform. With operations across North America, EMEA, APAC, and UAE, Dynamo empowers investment teams to operate efficiently, gain deeper insights, and make faster, more confident decisions. For more information, please visit DynamoSoftware.com.

- Founded in 1998
- 1,000+ global clients
- $10T client AUM

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