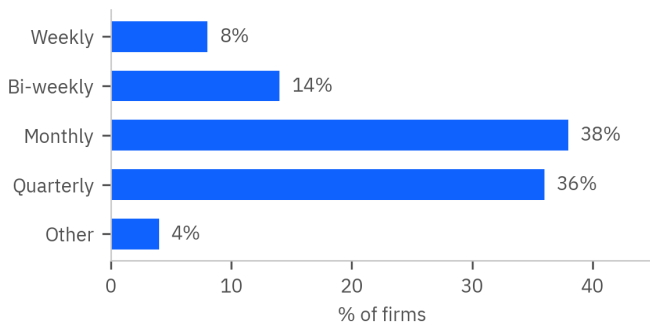


Portfolio Monitoring Benchmarks 2026

What 200+ PE finance teams told us about reporting cadence, team scale, and visibility in 2026

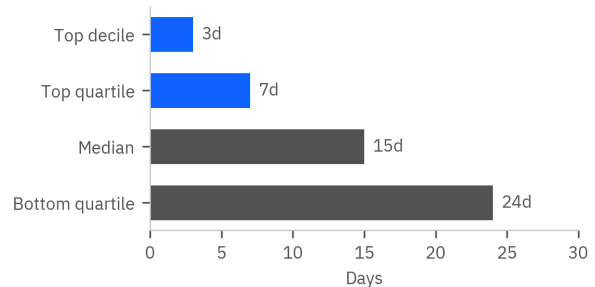
Mid-market PE finance teams are being pulled in three directions at once: LPs want faster and deeper reporting, portfolios are growing without proportional headcount, and macro volatility is compressing the timeline to detect issues at the portfolio company level. The benchmarks below show where finance teams stand across four dimensions of the operational stack — and where the top quartile pulls away from the median.

How often are portfolio-level metrics reported?



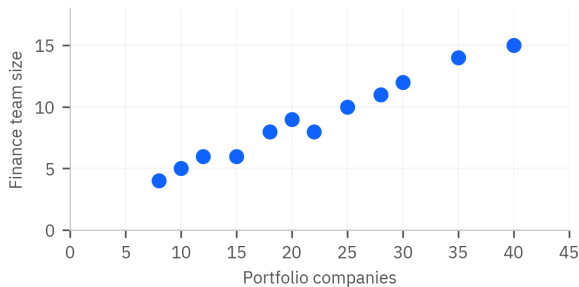
Top decile: weekly.

Days to aggregate portfolio data after quarter close



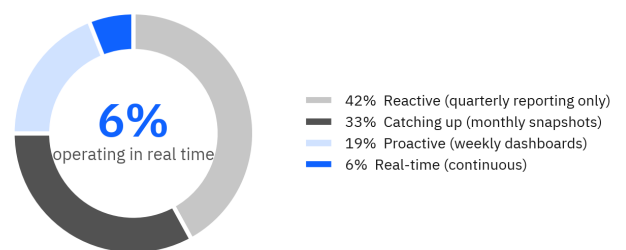
5x gap between top decile and median.

Finance team headcount vs. number of portfolio companies



Median ratio: 1 FTE per 2.5 portfolio companies.

Portfolio monitoring maturity (self-reported)



INSIGHT 01

The top decile aggregates portfolio data in 3 days. The median takes 15. The gap is operational, not sized.

INSIGHT 02

94% of mid-market PE finance teams are reporting monthly or slower. LP expectations are moving to weekly.

INSIGHT 03

Only 6% of PE firms describe their monitoring as real-time. That is the operational gap tariffs and macro shocks expose first.