

RATESHEET PRICING INSIGHTS



Publish competitive rates faster – with margin control built in.

Built for secondary marketing and capital markets teams managing daily pricing and margins.

YOU CAN...

- Benchmark margins with real market and competitor context
- Eliminate spreadsheet driven errors and guesswork
- Publish daily ratesheets in minutes, not hours

HOW IT WORKS

- Market data, competitor insight, and margins in one workflow
- Clear explanations for daily price movement
- One-click sync to the PPE so originators always see current pricing

Connect pricing and publishing in the Optimal Blue PPE and CompassEdge without switching systems.

AGENCY DIRECT



Simplify retained execution with clear coverage visibility in CompassEdge.

Built for financial institutions managing retained Fannie, Freddie, and FHLB executions.

YOU CAN...

- Gain clear visibility into loans, coverage, and net exposure in CompassEdge
- Reduce operational risk from manual spreadsheets
- Give executives confidence with simple, visual summaries

HOW IT WORKS

- Centralized view of loans, coverage, and commitments
- Model coverage changes before executing
- Visual rollups show loan volume vs. coverage at a glance

A purpose built, scalable CompassEdge workflow designed for risk averse lenders.

Contact your
Optimal Blue rep or
Sales@OptimalBlue.com
to learn more.