

For your team: proving the benefits of *Formuly*

Your analysts didn't sign up to relink rows, rebuild the same debt account, and recheck the model a fourth time before it goes out. Formuly does that mechanical work inside Excel, on your own workbook, so their attention stays on the deal. Every change is theirs to review.



01

Less repetitive *work*

Skip the calculations you've built a hundred times.

- **Checks run as you build.** Fifteen built-in checks look for inconsistent formulas, bad anchors, truncated totals, mismatched units, and unmarked inputs. The ones you choose run while you work, not at the end.
- **Ask for a section, then review it.** Formuly builds and edits project finance logic, from operations through to CFADS, debt sizing and sculpting, the DSRA, and the waterfall.
- **Start from structure, not a blank sheet.** A new Formuly model arrives with its sheets, styles, and named ranges in place, ready for your inputs.

02

More *control*

Formuly helps. The modeler decides.

- **See what changed before you accept it.** By default, Formuly's edits sit beside the rows they replace, so you read the before and after, then accept or reject.
- **You set the rules.** Choose which checks run as the model moves from build to edit to review, acknowledge findings, and leave sheets out. Automatic fixes are off until you turn them on, and each one can be undone.
- **One switch turns the assistant off.** No prompts, no background work, and no requests to its AI services.

03

Focus on *what matters*

More headspace for judgment, more time on the deal.

- **Catch it before your director does.** Findings are marked on the cell where a check failed, with the cells it depends on, so you start in the right place instead of hunting.
- **Understand a calculation quickly.** Ask what a line item is, what feeds it, and where it's set, including in a model someone else built.
- **One standard across the team.** The same checks and structure apply whoever builds the model, so reviews spend more time on the commercial story.

PROVING IT

Try it on a live model, not a demo

Trust is earned by checking. Run Formuly alongside your usual process and let your own numbers make the case.

A simple trial

- 1 Pick a live model and the next real change: a revised term sheet, a new tranche, a shifted COD.
- 2 Have one analyst make it with Formuly on a separate copy, from the same brief, while the usual process runs.
- 3 Review both together, cell by cell where it matters, and repeat for a few changes before you decide.

What to measure

Hours on build, linking, checking, and correction

Issues caught while building versus found in review

Time from a change request to a model you'd send

How long a colleague takes to explain a calculation

Keep the judgment. **Lose the busywork.**

Formuly is an add-in for Microsoft Excel on Windows, built by people with 40+ years of project finance, financial modeling, and deal experience. Customer data is hosted on Microsoft Azure in Australia. Audits against ISO/IEC 27001 and SOC 2 are in progress.

Book a working session

formuly.com/book-a-demo · hello@formuly.ai