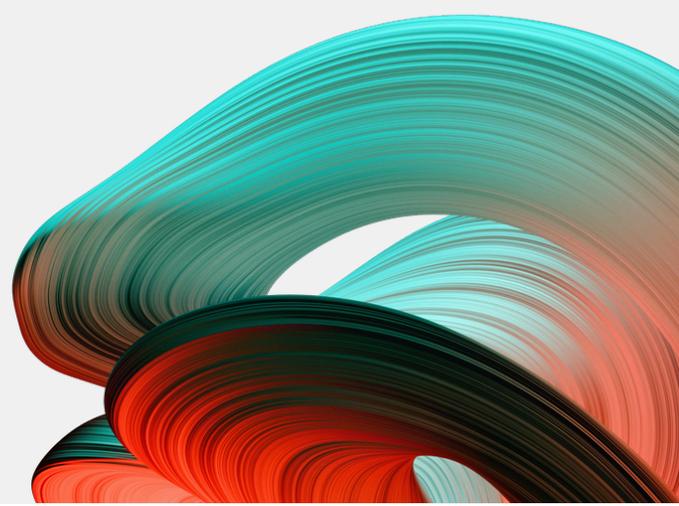


## USE CASE

# Investment intelligence for financial asset management



## Target

Consolidate research, filings, and market signals into a unified knowledge layer that supports faster analysis, stronger portfolio oversight, and more confident investment decisions.

## Challenges

Asset managers must analyze massive volumes of financial information to make informed investment decisions, but critical insights are often scattered across disconnected systems and unstructured documents.

- ⚠ Investment research relies on analyzing large volumes of earnings transcripts, SEC filings, analyst reports, news coverage, and macroeconomic data.
- ⚠ Data and research insights are fragmented across internal platforms, research repositories, and third-party sources.
- ⚠ Analysts spend significant time gathering, reading, and summarizing information rather than evaluating investment opportunities.
- ⚠ Important signals or risks may be missed when insights are buried within lengthy reports or distributed datasets.
- ⚠ Portfolio managers lack a consolidated view of market signals and research insights across their portfolios.

## Solution

With SeekrFlow™, asset management firms apply explainable AI to analyze financial documents, research reports, and market data, extracting insights from large volumes of structured and unstructured information.

The platform consolidates fragmented financial intelligence into a unified knowledge layer, enabling automated research summaries, trend detection, and signal discovery while maintaining full traceability to original sources and human oversight.

## EXAMPLES

- Summarize earnings calls, analyst research, and regulatory filings into concise research briefs
- Identify emerging risks or trends across portfolio holdings and market signals
- Generate investment memos or portfolio insights based on consolidated research data

## Impact

- ☑ Accelerate investment research and analysis across large financial datasets
- ☑ Improve portfolio risk awareness through earlier identification of signals and trends
- ☑ Increase analyst productivity by reducing manual research synthesis
- ☑ Provide more transparent and traceable investment insights