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## Ainstein Digital Research\* – AI-Enabled Financial Analysis for Finance and Governance

### **Ainstein is the new global standard in Risk Visualization and Risk Awareness - Creating Ambient Knowledge.**

Ainstein provides Portfolio Managers, Financial Advisors, Analysts and others with AI-Enabled Research at the Portfolio, Fund, Company, SubIndustry, Industry, Sector, Exchange, Country and Region levels.

### **Ainstein is sold under a Microsoft License and billable on the Azure cloud platform.**

- As a ready-made Buy vs. Build AI solution and Microsoft Cloud Service, Ainstein simplifies and elevates performance with a focus on Risk.
- The browser-based service saves vast work, is easy to customize, and activates within days of purchase.

### **If desired, Microsoft Azure Integrators can onboard Bank, Broker and Insurance clients – including:**

- (1) Fully compliant authenticated provisioning with Microsoft Security (free of PII).
- (2) Uploading of internal Portfolios plus external client Portfolios (including for resale).
- (3) Requests for other internal information to be integrated in the Ainstein Dashboards.
- (4) Compliance Applications.

**\*Ainstein Digital Research introduces HFR - Live, Streaming “High Frequency Research” - Including FactSet, ICE, Cboe, Arabesque, ETF Global, Moody’s, FRED, EDI, Official Board, Comtex, Brain and more.**

*“Artificial Intelligence (AI) is central to our new reality. Its broad use is increasingly influencing various aspects of our lives.”*

*“AI is transforming our workplaces and even our societies, redefining the arc of performance / success and risk / failure in fascinating new ways.”*

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### ***Creating Competitive Advantages par none.***

- *The strengths of AI applications lie in the ability to systematically observe, analyze and validate an unlimited variety and quantity of information in real-time to detect patterns - for instant, otherwise impossible, clarity.*
- *AI becomes a subtle, yet enormously powerful, structuring force.*

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### **This leads to a fundamental change in what Knowledge actually is...**

### ***Evolving to the vital next step... Ambient Knowledge***

- *AI will massively enhance the possibilities and the essential role of analysis in presenting choices and forming / validating decisions to steer / guide decision making.*
- *By so doing, AI will intensify the automated compartmentalization of intent information and reveal hidden patterns for new insights.*

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**Ainstein’s service features interactive three-dimensional VR Cubes and other Visualizations to spotlight hidden Risks and patterns for global stocks and funds, assessed across markets, industries and stock exchanges.**

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<https://azuremarketplace.microsoft.com/en-us/marketplace/apps/stocksmart1608173190585.ainstein-ai>



# Ainstein

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## Ainstein Ambient Knowledge Platform Features

### (1) Cubes – Portfolio-Level Research

- Visualizing Portfolios with VR to reveal Hidden Risk and simplify Risk Detection.
  - *Ainstein finds needles in haystacks.*
  - *Decision steps are intuitive and apparent.*
- Upload Portfolios and customize parameters to see “Your Cube.”

### (2) Risk Discovery Ribbons – Company-Level Research

- Built by an *II All Star Analyst* to support Research at speed and scale by moving repetitive work over to Assistive Technology - freeing people for higher-level pursuits.
  - The Risk Ribbons provide advanced Risk Monitoring / Insights / Mitigation.
- Customize by adding “Your” Risk Elements to the Array.

### (3) Ratings – Ainstein Rates Stocks and Funds [ETFs, UCITS, Mutual Funds]

- Ainstein provides a new foundation for data-driven decision making across asset classes.
- Ratings are Transparent, with full supporting detail for clarity, confidence and compliance.

### (4) Portfolio Check-Up – With Ainstein Ratings and Arabesque ESG Ratings

- Ainstein handles the analytics, including cross-comparisons, and adds Visualizations.

### (5) Hidden Holdings

- Ainstein reveals unwanted Risk and Portfolio Tilt now masked in ETFs and other Funds.

### (6) Earnings Season Advantage

- Ainstein takes the work out of the Quarterly Reporting Season - showing patterns like never before.

### (7) Industry Level Research

- Ainstein produces automated Peer Benchmarking tracking every SubIndustry, Industry and Sector.

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*Of note - Ainstein remedies in-house data integration challenges, taking the burden off of IT.*

**The Ainstein service includes easy integration with legacy applications and data sets as well as the uploading of client Portfolios, if desired via the onboarding services of Microsoft Azure Integrators.**

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