



Summary - Einstein

Ainstein is an AI-enabled system that generates risk-based metrics, models and visualizations for portfolio management and fiduciary oversight. Via Microsoft, users can easily upload their data assets and portfolios to Ainstein's powerful platform.

Using graph database technologies, Ainstein unifies internal data with multiple data sources to facilitate a broad array of dynamic risk analytic representations that can be customized, automated or trained via appropriate ML ensembles.

The group offers Risk Discovery Trackers – Each with Ainstein Ratings

- Portfolio Tracker, ETF Tracker, Earnings Tracker, Industry Tracker, Market Tracker, Company Tracker, ESG Tracker, Bond Tracker, SMART News Tracker, Mutual Fund Tracker and more.
- Users can choose to 'mix & match' or 'slice & dice' their portfolio analytics as they desire.

In UX/CX terms, Ainstein's Azure-based platform presents these Trackers in Dashboards, featuring VR Cubes and other advanced interactive Visualizations that can swiftly and easily be customized.

- Users can interact and engage with these 'risk representations' to model and explore the securities in more detail. Importantly, portfolios and securities alike can be easily weighted according to client preference and priority.

Microsoft sells Ainstein as "Assistive Technology" to simultaneously simplify and 'add value' to the work itself.

The Ainstein/Azure integration reduces 'man hours' required while elevating insights by surfacing otherwise hidden patterns and risks. Potential use cases of the offering consist of:

- Proactive Portfolio Risk Management
- Identifying / Minimizing / Mitigating Portfolio Risk and Hidden Tilt
- Performance Benchmarking of certain assets and companies
- Identifying Industry / Sector trends
- Identifying Risk in Hidden Holdings – companies held indirectly within a Portfolio
- ESG applications
- Compliance