



# The Next Step in Artificial Intelligence



**Ainstein customers see what matters, and are never again disenfranchised, as Ainstein bridges information asymmetries and creates information advantages, including strategic competitive advantages, with the new superpower of AI.**

- ✦ Ainstein's forward-looking analytics create unprecedented clarity and insights on a universe of over 35,000 companies, the core of global business, making Ainstein a must-have for asset owners, investors, and others.
- ✦ Ainstein is an autonomous and transparent 3rd Wave AI\* platform developed out of MIT to elevate decision making, recognize dynamic patterns, include vastly more actionable data, and harmonize alternative data and qualitative decision criteria such as ESG.
- ✦ Ainstein AI-powers decision making to master risk and successfully navigate every Company / Fund / Industry / Country / Region / Asset Class across global capital markets.
- ✦ Ainstein is equally essential for Governance by Boards and C-Suite Executive Teams running public companies.

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## Customers Include:

- ✦ **Global Banks, Brokerage, and Insurance firms** – Together with Microsoft, Finastra and others, Ainstein makes Digitization simple, immediate, and affordable – a Buy vs. Build solution to future-proof business models.
- ✦ **Retail Investors** – Ainstein is the 1st to provide expert-level Institutional-grade analytics equally to all.
  - Retail investors can connect Portfolios “1-click” to Microsoft 365, via Money in Excel.
  - Ainstein democratizes finance by providing intuitive access to highly advanced information sets in collaborative Visualizations, including novel applications of Power BI and “1-click” Reports.
- ✦ **Boards of Public Companies & Stock Exchanges**
  - Ainstein continually informs and supports with benchmarking vis-a-vis peers and Sector / Industry / Subindustry Level Analytics tracking in context with customers and competitors.
  - Ainstein simplifies and de-risks interactions with asset owners and regulators, especially during the fraught and high-risk Quarterly Reporting intervals.
- ✦ **Pension Customers** – Adding Ainstein Advice in Retirement Plans improves outcomes for retirees.
- ✦ **Employers** – Adding Ainstein Advice in 401(k) Plans is a new employee benefit, helping employers differentiate and demonstrate their desirability and commitment to employee security and Financial Wellness.

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\* A 3rd Wave AI is a term of art used by DARPA to describe an AI system which is superior in four respects:

- 1) Unreliant on training or matching to the past.
- 2) Able to use machine learning to reason in context.
- 3) Transparent. Able to explain results.
- 4) Able to provide answers and reveal interpretations of underlying detail on demand.

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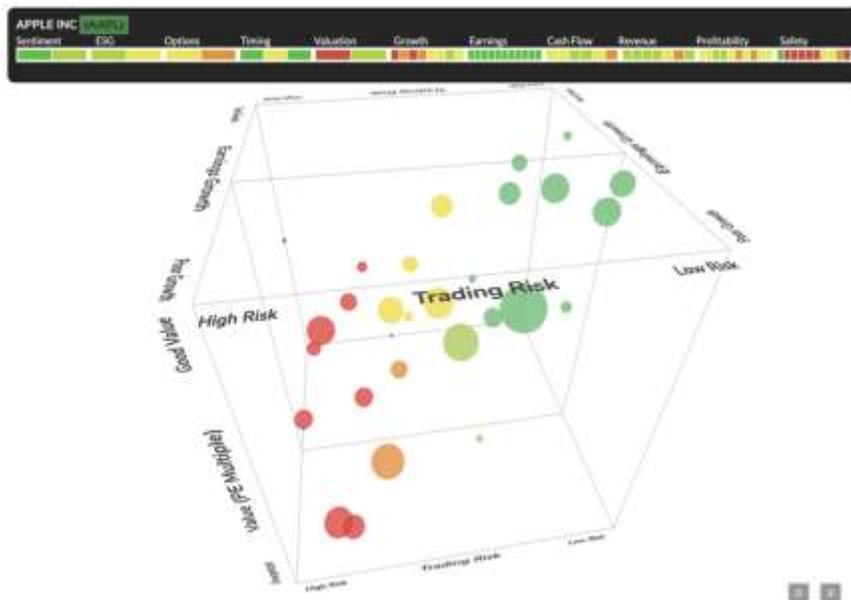
## Services Include:

- ⚡ Einstein itself does vast work in tracking markets and contains unprecedented data and detail with which to see patterns more easily and reliably and consistently make informed, data-driven decisions.
- ⚡ Einstein provides an AI Assistant, a highly sophisticated and tactical brain helping to systematically minimize risk and strategically capture Alpha via state-of-the-art applications of AI.
- ⚡ Einstein generates explanations and creates contextual models, providing superior and cognitive pattern recognition, including stock trading and behavioral patterns.

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## Customer Outcomes:

- ⚡ **For Investors** - Einstein Cubes include AI-Enabled Portfolio monitoring and Advice, key for Financial Wellness.
- ⚡ **Across Finance and the Wealth space** – Einstein accelerates Digitization and provides advanced Compliance and Client Reporting solutions.
- ⚡ **Bank and Brokerage** – Clients can be offered Einstein's next-gen, AI-Enabled Portfolio tool kit and intelligent market tracking - including Cubes – to improve customer service and risk awareness by fully informing investor clients.
- ⚡ **Einstein brings AI to Boards** - Adding AI-level decision support and unprecedented peer benchmarking for the Board and C-Suite decreases risk and improves decision making.



**Ainstein:  
the power  
of the Cube.**

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### Ainstein supports *Systematic* decision making at scale.

By creating *Systematic* diagnostics and automating dynamic pattern recognition, Einstein empowers and provides balance with unprecedented comprehension and instant at-a-glance insights.

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For more information, please contact: [sales@AinsteinAdvice.com](mailto:sales@AinsteinAdvice.com)

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