



## Ainstein AI Subscription Offering

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**Via Microsoft, Ainstein customers can accelerate digitization and easily gain substantial new competitive advantages, delivering on the promise inherent in AI.**

- Ainstein is a Cloud / AI productivity and risk solution, and a Microsoft ISV. Early adopters can open up a performance gap while AI laggards fall behind.
- Clients can engage under Microsoft's ULA (Universal License Agreement). SaaS subscriptions to Ainstein are billed by Microsoft as a line item on Azure.

**Ainstein "Sees What Matters" and supports *Systematic* decision making at scale.**

- By creating *Systematic* diagnostics and automating dynamic pattern recognition, Ainstein creates unprecedented insights and produces vast work in record time.
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**Ainstein changes the very nature of success - and work - wherever the impact of financial data is mission critical, data overload is a burden, or analytics can enhance performance.**

- Ainstein brings the new superpower of AI – while avoiding the risk, angst and delay of iteration toward AI, noting the 70+% failure rate of internal AI projects per PwC. \*
- Scale solutions to AI-powered risk mastery and time management of analytics are now achievable and affordable.
- As a key feature, Ainstein greatly simplifies quarterly earnings season for all parties, Corporate SEC Filers, Portfolio Managers and Asset Owners alike.
- Ainstein includes a range of ESG analytics too, even at the Portfolio and Fund Levels. Another needed simplifier, and newly mandated by the EU for MiFID Compliance.
- Ainstein is fully transparent and can be easily customized with direct access to the underlying detail. Banks streamline by running models against Ainstein's platform.

**With Ainstein, decision making is timely and fact-based. Never again ad hoc or unsubstantiated.**

- Responsiveness and transparency soar.
  - Risk exposure is visualized – and minimized.
  - Far less time and effort are involved.
  - Ainstein makes the digitization step simple. Activation and integration are immediate.
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### Across Finance –

- Banks, Investors, Advisors and Asset Owners can avoid risk and gain control with a drastic improvement in awareness and data-driven decision making.
- Ainstein provides an all-important information edge with less effort and at lower cost vs. alternatives.
- Taking action becomes clear and direct as Ainstein’s transformative interactive visualizations gamify content for instant comprehension and reveal hidden patterns and conditions that only a machine could truly see as they emerge.

**The investment community gains the strategic advantage of AI-Enabled Portfolio management and active monitoring plus improved access and collaboration, twice.**

1. Internally for Portfolio Management, Sales & Trading applications.
2. Externally for client reporting, hyper-personalizing the customer’s interface.

**For those Banks providing Ainstein’s intelligent customer experience to upgrade dated, *blind* legacy Portfolios, digitizing is a true Game Changer in elevating the firm.**

Ainstein customers accomplish a foundational transformation and become best-in-class.

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### Board Governance Dimension –

- Ainstein is an enabler of a better “risk management” and “risk oversight” *convergence* in governance and reporting contexts.
- Boards and Management of public companies can gain an edge while enjoying superior clarity and reducing risk, including the personal risk of legal liability otherwise unavailable via today’s conventional D&O insurance coverage.

### D&O Insurance Dimension –

- Board customers of Ainstein’s SMART *View*™ Governance Assurance solution gain a new legal safe harbor connected to quarterly reporting of SEC Filings.
- Without specific authentication of their company’s performance patterns vis-à-vis peer norms CEO’s, CFO’s and Boards challenged by the SEC have been held personally liable for their representations, with no coverage protection.

### Audit Committee Dimension –

- Ainstein also supports Big-4 Accounting firms on ESG initiatives by conveying highly-expert industry-level analytics of SDG’s, as is increasingly being expected, even demanded, of Audit Committees by Asset Owners and Pension Funds.
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