



Ainstein AI Subscription Offering

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.

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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