



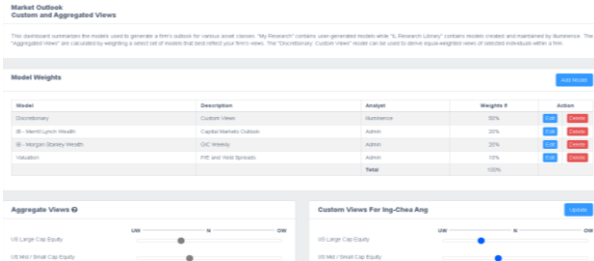
>>> ILLUMINATING INVESTING WITH DATA SCIENCE

The investment advisory industry is undergoing a transformation. The proliferation of information, along with recent advances in technology, including artificial intelligence, has made decision-making increasingly challenging. Illuminence provides financial advisors with cutting-edge tools to analyze and synthesize data and research. Our vision is to help advisors make better investment decisions and build superior portfolios for wealthy clients.

RESEARCH

Integrate Data Efficiently and Employ Evidence-Based Investment Decision-Making

Market Outlook assists users in collating bespoke research so that users can generate tactical views on different asset classes. Illuminence also provides some publicly-available research reports along with factor-based models for users in the portal.



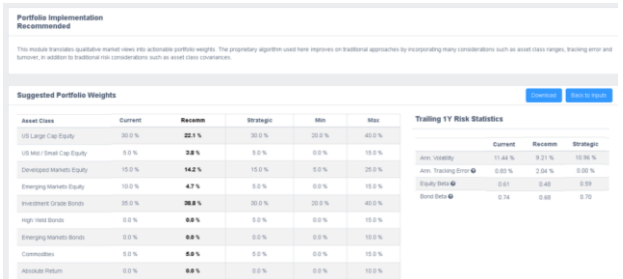
My Research allows users to include bespoke research views in their market outlooks. We are developing capabilities for AI / Large Language Models to instantaneously extract asset class views from unstructured data.

Research Assistant leverages OpenAI to allow users to glean insights from documents of their choosing, including those created internally. It can increase productivity by automating repetitive tasks such as handling RFPs and commentaries.

PORTFOLIO

Create Customized Portfolios for Every Market Environment at Scale

IPS Builder creates Investment Policy Statements quickly using Capital Markets Assumptions, taking into complexities including risk preferences, liquidity needs, taxes, and target returns, a first in the market.



Implementation builds custom portfolios quickly, taking into account constraints such as asset class limits and taxes. It integrates with portfolio aggregators (e.g., Black Diamond and Addepar), for client data and trading.

