Filing Navigator AI: Streamlined SEC Filings Research

Turn Complexity into Clarity with Filing Navigator AI Agent!

◼ More Action With AI Powered Financial Analysis

◼ Share instantly

◼ Visualize data

◼ Export insights

Simplify SEC Filings Research with Filing Navigator AI Agent

The Challenge:

◼ A single 10-K filing often exceeds 100 pages, and companies file numerous reports annually.

◼ Extracting meaningful insights from these dense documents can take hours, especially when searching for specific financial concepts

The Solution:

◼ Filing Navigator AI transforms how you analyze SEC EDGAR filings.

◼ Quickly uncover trends, risks, and patterns hidden within complex regulatory documents.

◼ Save time and focus on making informed decisions with actionable insights at your fingertips.

From Data to Decisions—Fast, Accurate, and Reliable

Why Filing Navigator AI Stands Out:

◼ Built for SEC Filings: Leverages the SEC's taxonomy for unparalleled accuracy and context-aware data extraction.

◼ AI-Powered Financial Analysis: Tracks critical metrics, visualizes trends, and identifies

anomalies directly from filings.

■ Plain-Language Interaction: Ask questions, analyze financial concepts, and uncover insights without needing advanced technical expertise.

Key Features:

■ Access unfiltered data directly from SEC EDGAR filings.

■ Instantly analyze financial concepts and metrics over time.

■ Export insights as PDFs or CSVs for seamless reporting and analysis.

Who Benefits from Filing Navigator AI?

Designed for Financial Professionals:

■ Financial Analysts: Streamline research and focus on strategic analysis.

■ Investors: Make data-driven decisions with confidence.

■ Corporate Researchers: Simplify the review of complex regulatory documents.

What You Gain:

■ Enhanced decision-making through precise, actionable insights.

■ A tool that grows with your needs—whether you're new to SEC filings or an experienced professional.

Now It Works

Access Company Filings with Ease

- Enter the ticker symbol and select the desired filing.

- Seamlessly connect to the SEC EDGAR database.

- Retrieve company filings for advanced AI-driven analysis.

Convert Filings to PDF for Easy Sharing

- Effortlessly transform filings into PDF documents.

- Download or share the PDF with a single click.

Unlock Financial Insights Instantly

- Browse & Filter: Navigate hundreds of financial concepts linked to your selected company.

- Gain deeper insights with an intuitive and user-friendly interface.

Visualize Financial Data with Precision

- Explore dynamic financial concepts through interactive visualizations.

- Gain clarity and actionable insights at a glance.

Export Financial Data in CSV Format

- Simplify your workflow with one-click CSV exports.

- Access detailed financial data for further analysis or reporting.

Generate AI-Powered Questions

- Select a financial concept and description to generate targeted questions.

- Leverage AI to deepen your understanding of key financial metrics.

Create Comprehensive Financial Reports

- Harness advanced GPT technology to generate detailed financial reports.

- Customize reports based on selected concepts, descriptions, and AI-generated questions.