

Bullpen harnesses AI with institutional knowledge
that improves with every decision.

THE BULLPEN PLATFORM

Bullpen platform core capabilities

Bullpen leverages your firm's institutional expertise to AI-automate the creation of decision-ready investment materials by encoding firm knowledge as the foundation, then composing it into every workflow.



Knowledge Sets

Firm-owned, versioned standards composed into every task.



File Intelligence

Context-pruned analysis across thousands of source documents.



Templates

AI-powered, prompt-editable report frameworks tailored to your process.



Validation

Multi-model Socratic checks that surface conflicts before you do.



Collaboration

Shared canvas, connectors, project folders, file rooms, and knowledge sets.

THE PROBLEM

AI FAILS FIRMS IN THEIR INVESTMENT DECISION-MAKING

WHERE IT'S HELPING

- ✓ Preliminary research
- ✓ Investment screening
- ✓ High level analytics
- ✓ Summarization & first drafts

WHERE IT LETS DOWN FIRMS**CONTEXT**

Fails to capture intent

CONTROL

Requires prompting manipulation

RIGOR

Manual, error-prone & time consuming review process

**INEFFECTIVE
WHEN IT
MATTERS
MOST**

To de-risk AI use, analysts must either become prompting experts or the tools must evolve to bridge the gap

THE BULLPEN SOLUTION

SCAFFOLDING FOR INVESTMENT DECISIONS

Infrastructure that ensures reliability so that humans don't have to resort to prompting gymnastics

Firm-specific, highly contextual,
LLM-powered, user-controlled

VALIDATION

Malleable workflows that
adhere to firm-specific
tone, voice and
methodology

CONTROL

Domain-specific &
firm-specific context (
e.g, formulas, financial
definitions, conventions,
intent, methodology,
standards, guardrails)

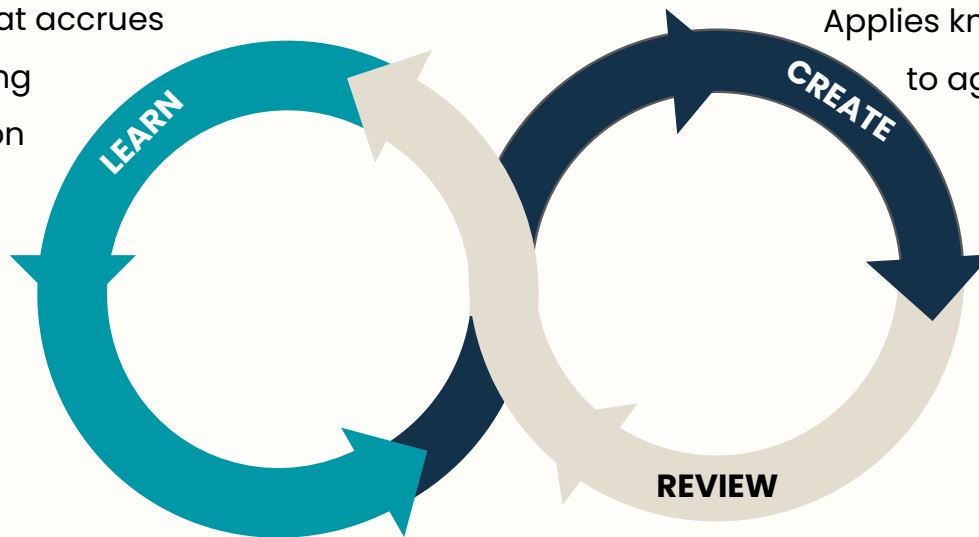
KNOWLEDGE

SCALED RELIABILITY THROUGH COMPOUNDING

KNOWLEDGE

1 KNOWLEDGE

Domain expertise that accrues with use by fine tuning preferences based on known adherence and corrections



2 WORKFLOWS

Applies known institutional knowledge to agentic workflows to generate outputs that are highly reliable from the outset.

3 RIGOR ENFORCEMENT

Audits for conflicts, consistency, and adherence to firm's preferences and methodologies through validation, evaluation and agentic reviews.

CUSTOMERS ARE EXPERIENCING THE VALUE

Pilot scorecard: Tier I Private Asset Firm

Criteria	Outcome	Score
OUTPUT EFFICIENCY	Initial draft achieved 90% of overall decision-readiness in seconds	★★★★★ "Very Fast!"
OUTPUT QUALITY AND RELIABILITY	Well annotated outputs, verified against sources, with identified inconsistencies	★★★★★ "Competitor achieved 1/5 score"
ADAPTABILITY & USABILITY	Users can modify templates and outputs to fit internal standards without external dependencies.	★★★★★ "Very good!"
FOUNDATIONAL CAPABILITY	Functional templated workflows yielded consistent quality outputs	★★★★☆

"With Bullpen, we are delivering better insights and more consistent reports. When generating a first draft of a credit committee memo, the output is immediately useful, requiring minimal to no edits"

- Senior Credit Analyst (\$350BN Global Bank)

"We're now able to evaluate more investment opportunities with the same investment advisory team size. The work that the team is doing with Bullpen allows them to accelerate their research cycles while maintaining the quality standards we pride ourselves on."

- General Partner (NY-Multi Family Office)

"Generating incremental revenue through co-investments has long been a goal. Our team are always stretched and so we never implemented the plan until we started working with Bullpen."

- General Partner (NY-Based Hedge Fund)

ENSURING THE SAFETY AND PRIVACY OF YOUR DATA

No data used for training

We never utilize your private data to train models.

Privacy of sensitive data

Data is kept in isolated environments, separate from other clients' information.

Complete data transparency

Manage data access and utilization with comprehensive insight into your operations.

Advanced and secure data practices

Bullpen implements zero-trust principles, minimal access, and robust authentication.

Data encryption

Bullpen user data is secure, ensuring encryption during storage and across networks.

Regular audits and testing

Bullpen is consistently audited and tested for vulnerabilities by independent experts. SOC 2, ISO 27001 & GDPR Compliant