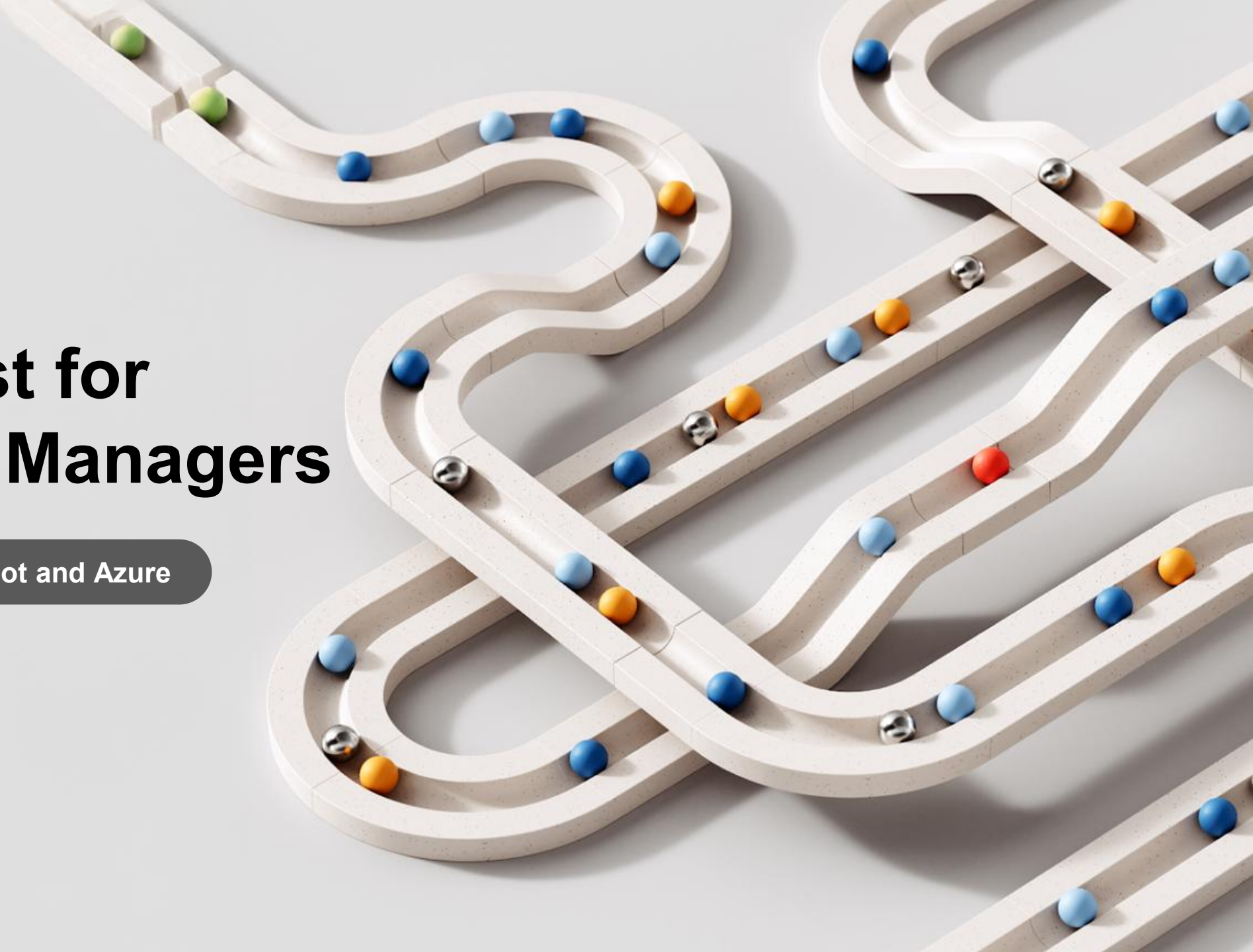




# Agent Invest for Investment Managers

Powered by Microsoft Copilot and Azure

October 2025



# Executive Summary

Straive combines deep domain expertise with enterprise-grade AI to power your Next-Gen Research platform. The Agent Invest Solution helps your research and investment teams enhance sourcing, streamline monitoring, and scale intelligence. It delivers immediate business impact while positioning your organization for long-term leadership in data-driven decision-making.

## Our Value Proposition for the customers

### Purpose-Built AI, Not Off-the-Shelf Tools



The Agent Invest solution is specifically designed for complex markets and specialized workflows. It covers sourcing, screening, monitoring, and reporting to ensure all outputs are seamlessly aligned with how your teams actually work.

### Collaborative by Design



Developed alongside the customer's research and investment team to guarantee seamless workflow integration, with Straive driving the end-to-end solution delivery.

### Strategic Data Curation, Not Data Overload



We prioritize signal over noise, leveraging regulatory filings, operational data, knowledge graphs, and sector-specific insights to deliver relevance and actionability, not just data volume.

### Enterprise-Ready, Not Experimental









Agent Invest is deployed using Microsoft Copilot Studio and Microsoft Fabric, ensuring production-level quality. The solution offers a fast path to value, deploying within your existing infrastructure to work immediately with live users, production data, and current workflows..

### Accelerated ROI Through Domain Expertise



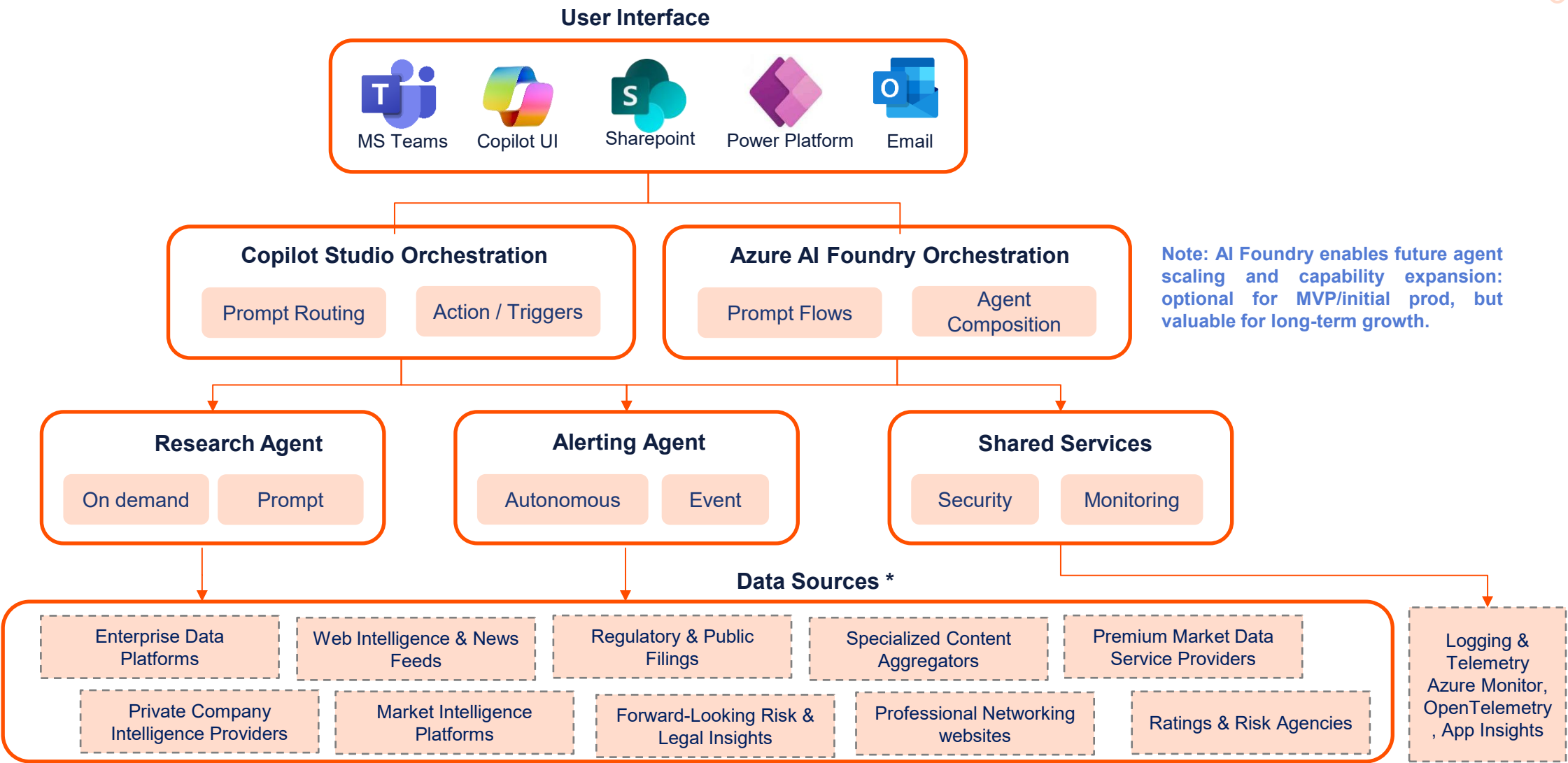
We leverage our deep domain expertise in complex markets and specialized workflows to quickly target and address operational pain points. This focus maximizes utility immediately and ensures the high-impact use cases are validated for long-term, scalable AI adoption.

# Scope: What the Agent Invest Solution Delivers

Component		What It Does		Why It Matters
 <b>Research Agent</b>	On-demand agent that identifies high-potential issuers across all asset classes. It then produces a first-pass analysis using firmographics, financials, and relevant external signals.	Equips investment managers to discover and qualify off-market leads more efficiently, with richer early-stage context to inform prioritization and outreach.		
 <b>Alerting Agent</b>	This passive agent continuously monitors existing portfolio company performance, surrounding market signals, and risk indicators. It automates time-intensive tasks by generating performance summaries, surfacing early risk flags, and auto-populating risk & performance review templates	Automates time-intensive monitoring tasks while integrating crucial external market context (e.g., peer distress, industry shifts). This ensures proactive oversight of issuers across all asset classes.		
 <b>Agentic AI Architecture</b>	Built on Microsoft Copilot Studio with modular agents specifically orchestrated for your workflows. It integrates seamlessly with Microsoft Fabric and your internal systems, and it's designed to learn and improve over time	It delivers explainable, role-aligned intelligence that seamlessly integrates with your existing systems. The solution is inherently enterprise-ready and designed for secure, controlled scale-up.		
 <b>Precision Data Strategy</b>	Combines your internal systems (Fabric, SharePoint, etc.) with differentiated external sources (public filings, financial databases, market datasets, news, and media feeds) to power decision-making	Maximizes the signal-to-noise ratio, ensuring both sourcing and monitoring outputs are highly relevant, timely, and rooted in the right data to enrich decision-making.		

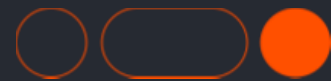
*The Agent Invest solution serves as a single source of truth for investment intelligence. Shaped by the expertise of your research team, it guarantees alignment with how investment managers source, analyze, and prioritize opportunities across global markets.*

# Illustrative Solution Overview

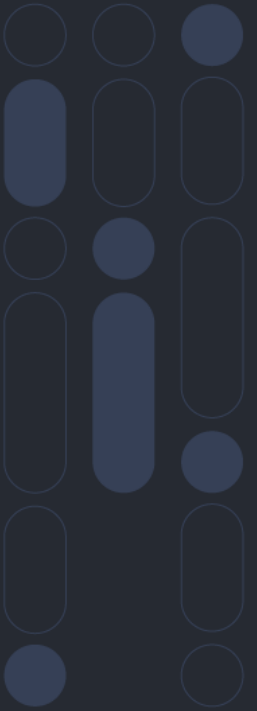


Note: AI Foundry enables future agent scaling and capability expansion: optional for MVP/initial prod, but valuable for long-term growth.

\*Data sources here are illustrative and not exhaustive



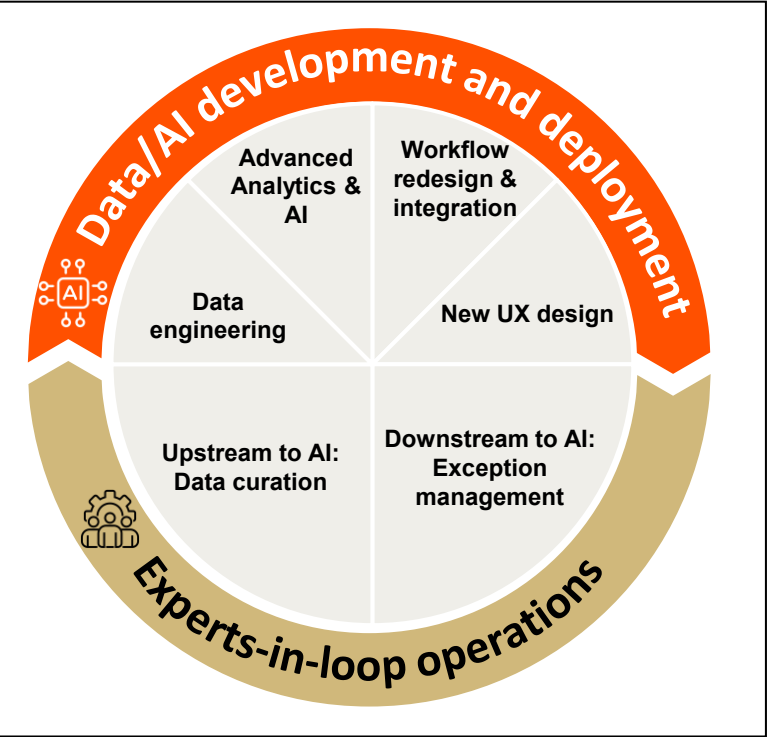
# Straive Overview



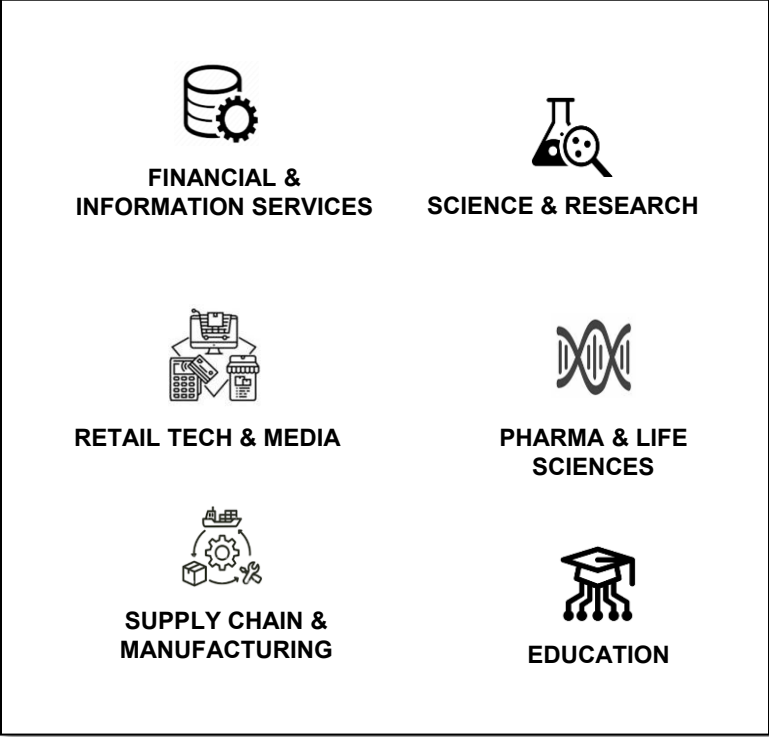


# Unique combination of cutting-edge Data Analytics & AI with scalable expert-in-loop global operations makes Straive a **One-stop enterprise partner for Data/AI Operationalization**

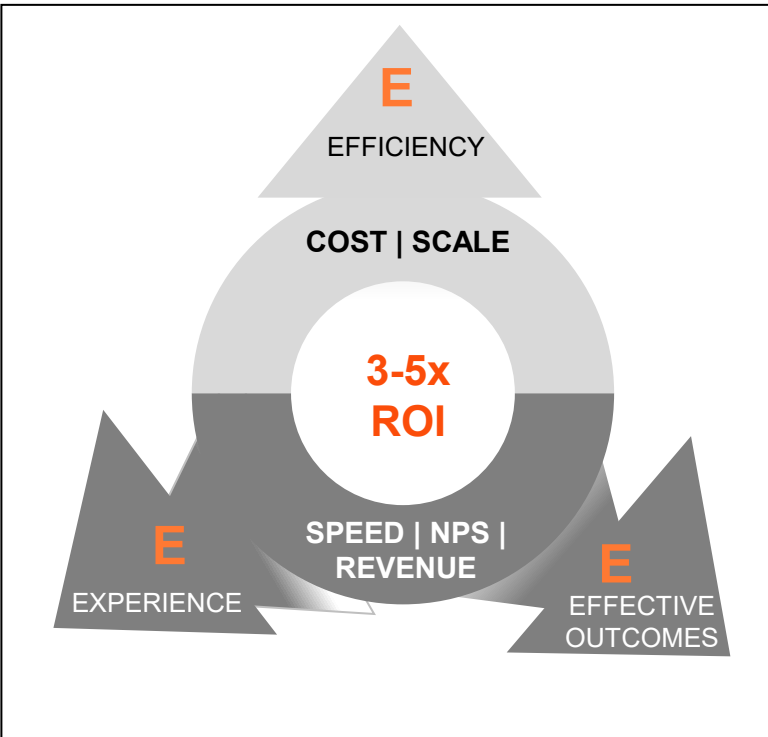
## Data/AI Operationalization Capability



## Domain Specialist in Six Industries



## “Triple-E” Trifecta Impact



<b>18K</b> Employees	<b>1/3<sup>rd</sup></b> Masters & PhDs	<b>200+ Clients</b> 30+ countries	 Delivery across 5 continents	 Rated Star / Leader by Industry Analysts		 Owned by Top 2 PE with \$300Bn+ of AUM
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# Thank you



We leverage our unique people-process-tech framework to build the best-of-breed data analytics & AI solutions. By operationalizing this solution into your core workflow, we deliver real-world measurable impact and better ROIs through a combination of higher efficiency, elevated experiences, and enhanced revenues.

