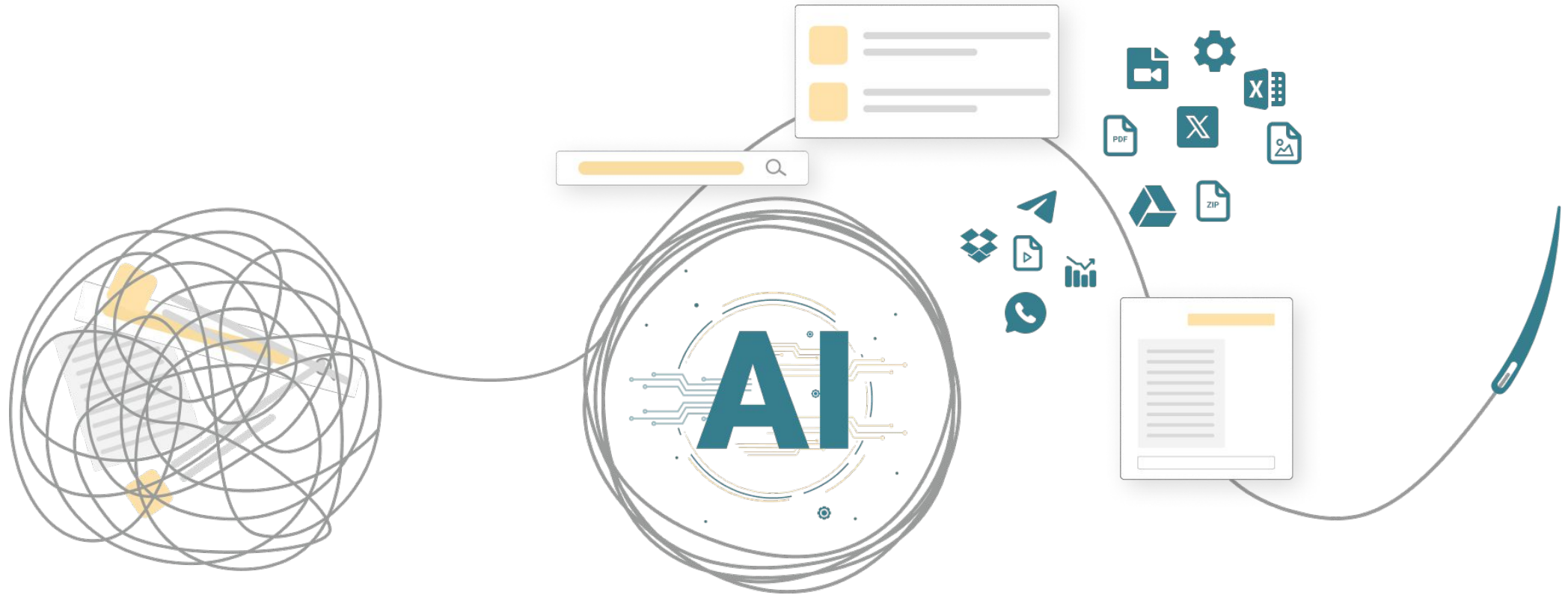


need.ai

Seamless Information Intelligence, powered by AI





“

As our digital lives become increasingly complex, we find ourselves overwhelmed by the volume and variety of data we encounter daily. That's why Kuntal and I founded [Needl.ai](#) – a comprehensive [AI Information Curation and Management solution](#) that seamlessly collates and auto-organizes all your information in one place.

- VIKRAM SRINIVASAN | Co-Founder



“

I've been immersed in the world of value investing for more than three decades. I find focused learning more fun and valuable than aimlessly consuming information without really connecting the dots. This is why, what we have built with [Needl.ai](#) is so powerful – it bridges the gap between disconnected, unstructured information and concise data insights for the users.



- KUNTAL SHAH | Co-Founder



About Us: Founders & Advisors

FOUNDERS

who have done this before

VIKRAM SRINIVASAN

25+ years of experience



KUNTAL SHAH

30+ years of experience



ADVISORS

with strong industry expertise

ANIL GANDHI



AMIT KHIVESARA



TEAM LEADS

who deliver

VENKATA
Engineering



MAYUR
Sales & Growth



VARUN
Machine Learning



NITIN
Product



SWAPNIL
Customer Success



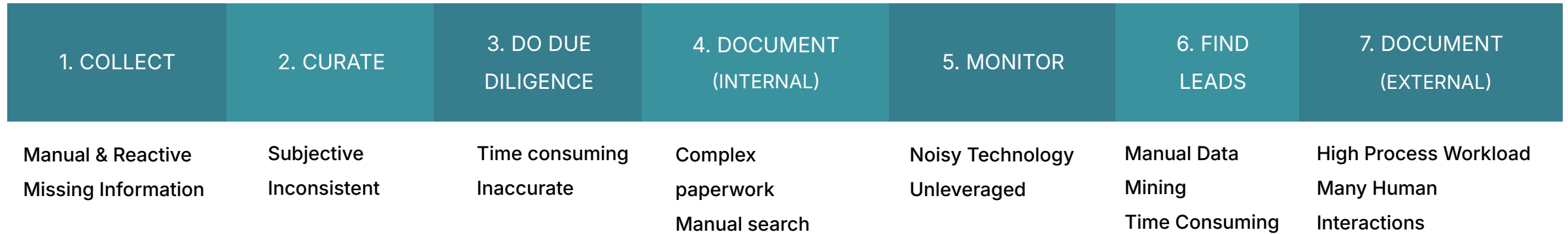
KUSUMAKAR
Principal Engineer





The Problem: Information Management is Complex

Information Management in Enterprises is often manual, inefficient, error-prone



38%

Time spent **communicating** about work, searching for data & switching apps*

3600

Number of times employees **switch apps** per day

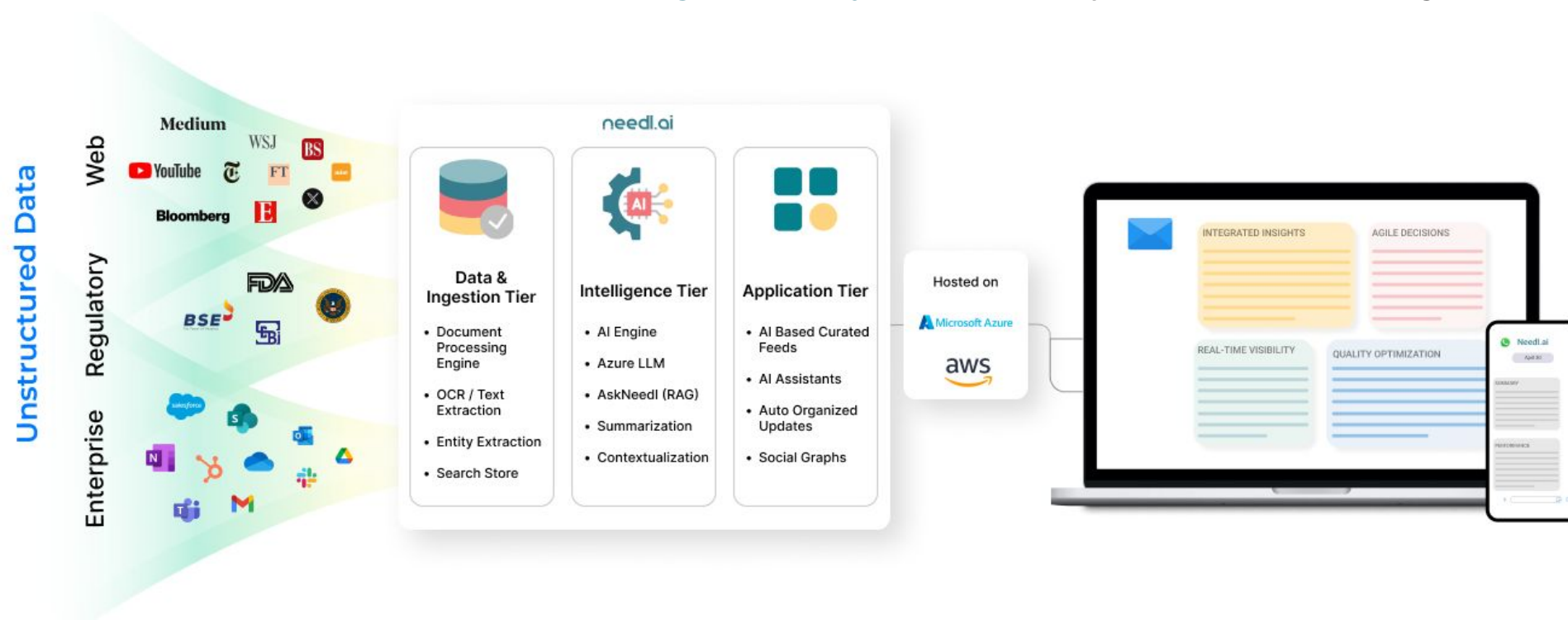
1.8 hrs

Hours spent by employees every day **searching and gathering** information





An AI-Powered Information Intelligence Ecosystem for enterprise decision-making



CONNECT

Link preferred apps and data sources.
Seamlessly access all data in one place,
without switching between apps or tabs.

CURATE

Create personalized Needl Feed and build
automated workflows and AI Assistants,
tailored to your specific information needs.

CONVERSE

Centralize interactions with data across
your preferred sources using Ask Needl.
Get verifiable answers with citations.



The Solution: Customer Pain Points Addressed by Needl.ai

PAIN POINT

SOLUTION

Information Overload

Disparate systems and fragmented data silos.



Unified Information View

Access diverse data sources via a single interface; **eliminate data silos.**

Difficulty Integrating new systems

Data management systems incompatible for enterprise.



UI Flexibility

Use Needl.ai your way - as an **API**, via platform, app, or a **custom dashboard**. Get comprehensive **Email** updates.

Inefficient Decision-Making

Poor data insights due to manual data aggregation and analysis.



LLM Flexibility

Integrate any Large Language Model to align with your ecosystem.

Data Security

Need to protect sensitive data with strong access controls to stay compliant.



Cloud Flexibility

Use leading cloud providers (**AWS, Azure, GCP**) or **private** Enterprise cloud.

Data Growth

Constant increase in volume and high data management costs.



Petabyte Scale

Scalable Information Processing; **affordable** solution that grows with data needs.

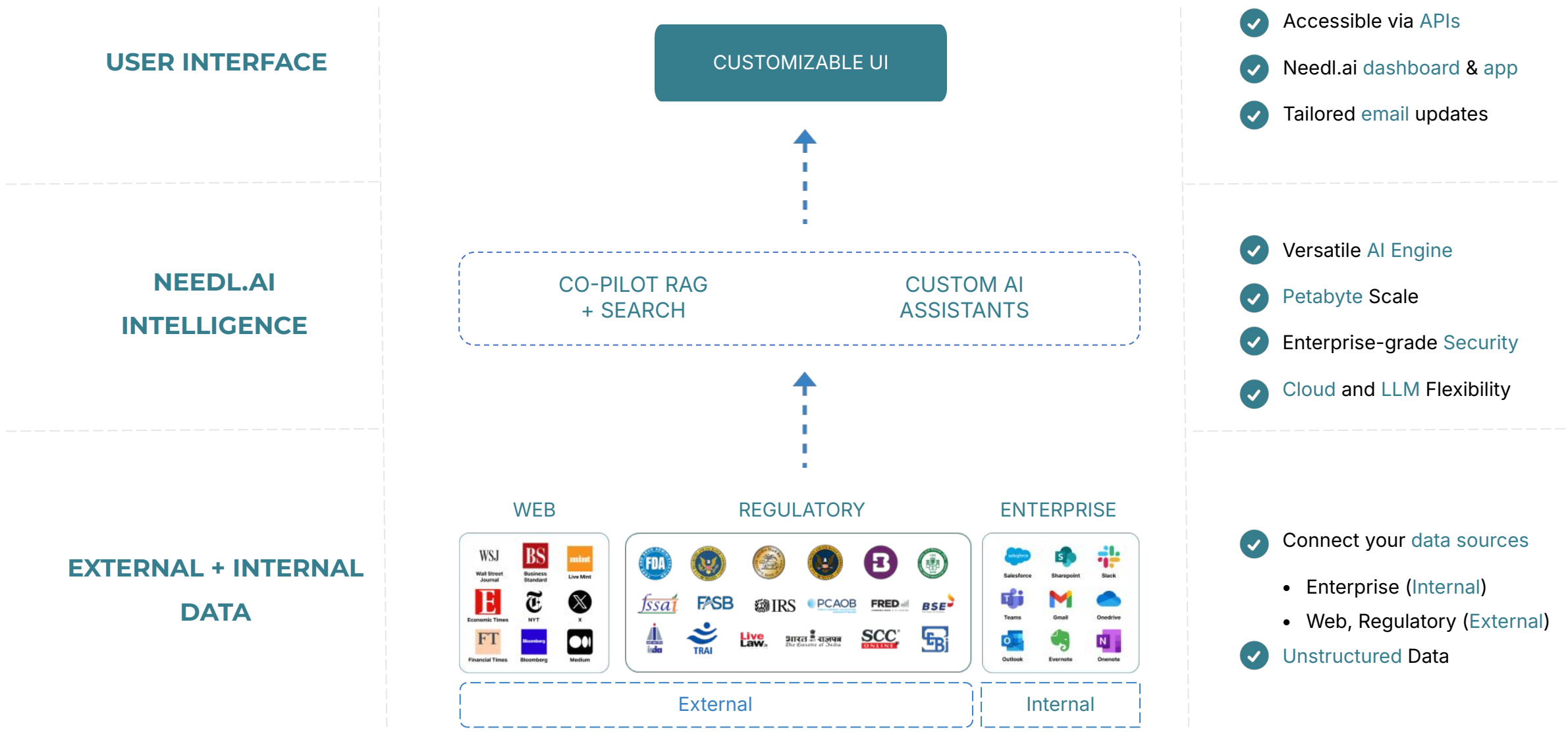
Complex Workflows

Need for adaptable, automated solutions for unique enterprise needs.



Versatile AI Engine

Easily adapts to **diverse workflows** for relevant insights and automation.

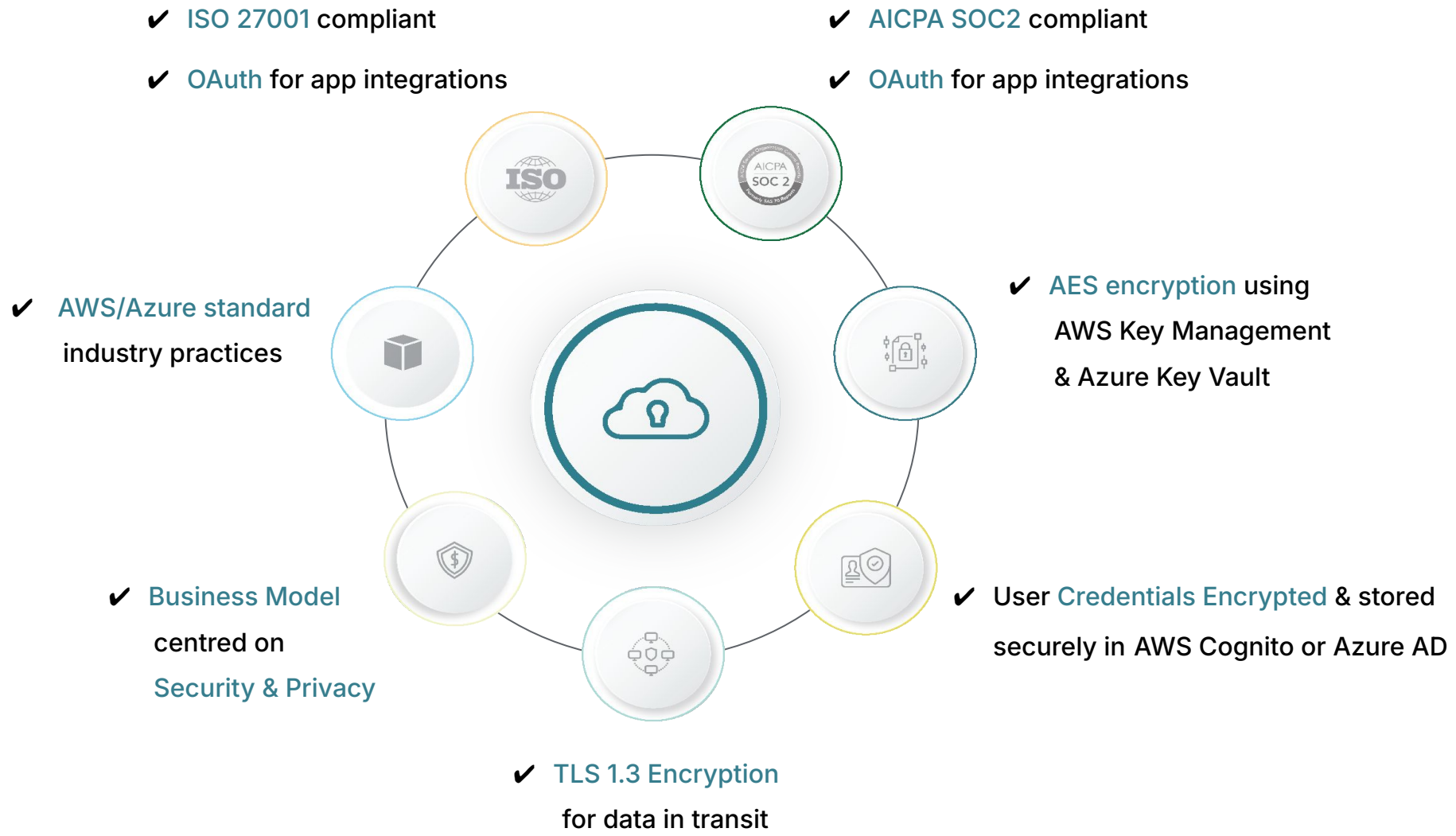


- ✓ Accessible via APIs
- ✓ Needl.ai dashboard & app
- ✓ Tailored email updates

- ✓ Versatile AI Engine
- ✓ Petabyte Scale
- ✓ Enterprise-grade Security
- ✓ Cloud and LLM Flexibility

- ✓ Connect your data sources
 - Enterprise (Internal)
 - Web, Regulatory (External)
- ✓ Unstructured Data

Our Value Proposition: Data Security & Privacy





1. NEEDL FEED

AI Data Aggregation

My Data
Today | Emails | Social Media | Websites | Exchanges

Why the Tech Pessimists Are Wrong
Tech has swollen to 28% of the S&P 500, the index's largest sector. The digital revolution is the story of this century, and every company is reinventing itself with technology.

Recent layoff by TYP Capital
The recent layoffs by TYP Capital underscore the complexities of the corporate world. While layoffs are undeniably painful, they can be a necessary step to ensure a company's long-term viability. It is essential for

Job Application
I have attached my resume/CV, which provides a detailed overview of my professional experience and qualifications. Here are some highlights of my background that make me a strong fit for this role.

- ✓ **AUTO-UPDATE and TRACK**
- ✓ **Advanced FILTERS**
- ✓ **Source PRIORITISATION**

2. NEEDL ASSISTANTS

Custom AI Assistants

Alerts Assistant

Equity Analyst Assistant

Document Synthesis Assistant

Summarization Assistant

- ✓ **CUSTOM ASSISTANTS and alerts**
- ✓ **DOMAIN EXPERTISE and tailored summaries**
- ✓ **PRECISION and CONSISTENCY**

3. ASK NEEDL

Enterprise RAG

Ask Needl
My Data | Needl Universe

Please summarize top 3 market trends relevant for my brand

Sustainability: There is a rising consumer demand for eco-friendly products, prompting brands to adopt sustainable practices.

Technological Advancements: The adoption of AI, ML, and digital banking technologies is reshaping industries, emphasizing the need for enhanced customer experiences and cybersecurity.

Ask follow up...

PATENT PENDING

- ✓ **CONVERSATIONAL interface**
- ✓ **Verified CITATIONS**
- ✓ **PETABYTE Scale**





Our Product: Industry Use Cases



Investment Research

1. NEEDL FEED

[Watchlist](#) | Global News, Events, Earnings Calls
[New Opportunities](#) | Identify and Invest

2. NEEDL ASSISTANTS

[Equity Analyst Assistant](#) | Insights from Analyst / Investor Reports, Earnings Calls
[Summarization Assistant](#) | Custom Daily Market Summaries

3. ASK NEEDL

[Instant Answers](#) | Engage with Financial Reports
[Financial Insights](#) | Identify Opportunities and Risks



Credit Ratings Research

1. NEEDL FEED

[Reports Tracker](#) | Financial Statements, Annual / Quarterly Reports
[Red Flags](#) | Enhance Accuracy of Ratings

2. NEEDL ASSISTANTS

[Ratings Assistant](#) | Insights on Annual / Quarterly Reports, Across Listed / Unlisted Companies
[Document Synthesis Assistant](#) | Decode Long Complex Documents

3. ASK NEEDL

[Quick Insights](#) | Converse with Target Company Data
[Red Flags](#) | Insights to Determine Accurate Ratings



Regulatory Monitoring

1. NEEDL FEED

[Regulatory Tracker](#) | Regulatory Updates, Amendments
[Compliance](#) | Get Regulatory / Client Activity Feeds With Alert Keywords

2. NEEDL ASSISTANTS

[Regulatory Assistant](#) | Near-Real-Time Alerts on Regulatory Changes
[Due Diligence Assistant](#) | Tailored DD Reports on Clients' Target Companies

3. ASK NEEDL

[Prompt Counsel](#) | Interact with Regulatory Information
[Document Generation and Review](#) | Converse With Complex Legal Documents

Success Stories in Finance: Investment Research

Company: Leading Asset Management Company

❖ Challenge

Chief Information Officer, Fund Managers, and Analysts struggle to keep track of information scattered across enterprise and web.

1. **Information Overload** – Processing and analyzing vast amounts of market and enterprise data.
2. **Manual Processes** – Reliance on time-consuming, manual information collation and summarization.
3. **Contextual Relevance** – Challenges in ensuring timely and relevant information.

❖ Outcome

1. **10 Hours** per week reduced in collecting and organising information.
2. **50%** less time in generating reports.
3. **50%** less time creating custom reports.
4. Protect downsides from custom alerts.

❖ Solution

1. **Needl Feed** – Auto-organize information on portfolios, sectors, themes across enterprise, web and regulatory data.
2. **Alerts Assistant** – Custom alerts on specific market moving events.
3. **Summarization Assistant** – Custom daily summaries on markets.
4. **Equity Analyst Assistant** – Custom reporting across analyst reports, investor presentations, and earning calls.
5. **Ask Needl** – Converse with financial information to quickly identify opportunities and risks.

❖ Testimonial

“ I no longer spend time in endless dumpster diving in my hard drive or scrolling of social media to find the right tweet about the topic I'm working on, or go to the horrid 2nd & 3rd page of google search results to find the right substack / media mention of a topic I'm researching. It gets sorted for me with Needl.ai. It's fast, it's accurate & it also surprises sometimes by pulling relevant stuff out a pile of my own data which I otherwise wouldn't have remembered on my own.

– Head of Research



Success Stories in Finance: Commodities and Energy Trading

Company: Prominent Renewable Energy Company

❖ Challenge

Energy traders face losses when unaware of market moving events that influence trading positions and decisions.

1. **Missing Key Information** – Market moving events could significantly alter the nature of positions taken by traders.
2. **Monetary Risks** – Missing key updates can risk losses of up to several million a year.

❖ Outcome

1. Several instances where Needl Custom alerts allowed traders to make significant profits within the first three months of implementing Needl Assistants.
2. One instance where Needl Alerts allowed traders to make **\$250K in one day**.

❖ Solution

1. **Alerts Assistant** – Tailored, near-real time alerts during trading hours on market moving events.
2. **Summarization Assistant** – Automated , comprehensive summaries that decrease the likelihood of missing key developments.
3. **Ask Needl** – Ability to ask questions on internal analyst reports, energy news reports, and world wide news that could impact markets to dig deeper.



❖ Testimonial

“ By entering the market armed with the latest news, traders were able to make \$250k with confidence in a single day.

– One of the Traders

“ Needl.ai has gone above and beyond in delivering value. We see opportunities to leverage Needl.ai with our wholesale team and are interested in expanding its scope across the company.

– Champion within the Company

Success Stories in Finance: Rating Research and Reports

Company: Leading Rating Agency

❖ Challenge

Risk analysis of listed and unlisted companies from annual reports and quarterly updates is time consuming and inefficient.

1. **Large Complex Documents** – Annual reports containing over 500 pages of complex data are required to be analyzed.
2. **Time Sensitive Processes** – Analyzing information accurately across several earnings calls is time consuming.
3. **Opportunity Loss** – Missed opportunities on evaluating risk accurately could cause losses of revenue and reputation.

❖ Outcome

1. **80%** reduction in time spent on generating reports
2. **90%** more accurate coverage of relevant information in coverage report
3. Reduction of **300 pages of documents into crisp 15 page** summary.

❖ Solution

1. **Rating Assistant** – Bespoke reports on complex annual reports and quarterly reports, across listed and unlisted companies.

[Example: Yes Bank Report](#)



❖ Testimonial

“ The custom reports for different sectors created by Needl.ai, significantly reduced our TAT in creating ratings reports for the listed and unlisted companies we cover with confidence. We could increase the coverage of companies, by 50% without increasing the workload of our analysts.

– Chief Information Officer

Success Stories in Finance: Merchant Newsletter

Company: Global Payment Gateway Firm

❖ Challenge

In light of the increasing number of complex bulletins posted by card processing firms like Visa / Mastercard, communicating changes and updates to Merchants is a time consuming process for analysts.

1. **Complex Information** – Difficult to decode elaborate bulletins and guides in complex PDF formats.
2. **Complex Logic** – Challenging to ensure seamless integration of complex logic across diverse documents.
3. **Time Consuming Process** – Analysts billing hours are expensive, and this process requires 50% more manpower.

❖ Outcome

1. **50%** reduction in time spent on generating reports.
2. **95%** accuracy.
3. Better than (or as good as) analyst generated news letters in **80%** of the cases.

❖ Solution

1. **Bulletin Summarization Assistant** – Analyzes complex PDF documents, understands complex logic, multiple lookups and generates an automated newsletter within seconds.



❖ Testimonial

“ Needl.ai was a great partner in solving this exceptionally challenging technical problem. Needl.ai’s capabilities are top notch. We loved working with them and realised that the Needl.ai platform is exceptionally power and they are able to easily configure the platform for unique enterprise needs.

– Product Manager

Success Stories in Legal: Regulatory Monitoring

Company: One of the Largest Global Law Firms

❖ Challenge

Monitoring regulatory changes / amendments across various jurisdictions and focus industries / practice areas is tedious.

1. **Low Time-to-Billing ratio** – Associates spent 20% time in manual monitoring and interpreting regulatory movements.
2. **Time Sensitivity** – Risk of missing important updates and not educating clients on their impact in a timely manner.
3. **Risk of Penalties** – Missing critical regulations can risk penalties for clients in the millions.

❖ Outcome

1. **70%** reduction in time spent by associates in monitoring regulatory changes and amendments.
2. **30%** increased client satisfaction since they were aware of regulatory updates in a timely manner and could adapt strategies.

❖ Solution

1. **Needl Feed** – Updated stream of regulatory information across various jurisdictions and focus industries and practice areas.
2. **Alerts Assistant** – Near-real time alerts on regulatory changes.
3. **Summarization Assistant** – Daily and weekly summaries on important updates delivered to attorneys.
4. **Due Diligence Assistant** – Tailored, automated due diligence reports on clients' target companies.
5. **Ask Needl** – Prompt counsel and interactions with regulatory information and complex legal documents.



❖ Testimonial

“ Using Needl.ai at our legal firm has dramatically improved the satisfaction of our partners and clients. We are able to monitor and track changes in a complex and fast moving regulatory landscape, have our associates do appropriate research on this and keep our customers and clients informed in a timely fashion helping them adapt corporate strategies effectively.

– Chief Innovation Officer

Success Stories in Finance: Maintenance Coverage Reports

Company: Prominent Asset Management Company

❖ Challenge

Maintenance coverage of portfolio companies during earnings season is challenging, and missing critical information is risky.

1. **Fragmented Data** – Data split across past research, analyst reports, earnings call and investor presentations.
2. **Time-Sensitive Processes** – Summarizing and analyzing information accurately across several calls during earnings season is challenging
3. **Opportunity Loss** – Missed opportunities on taking the right positions if analyst missed critical information.

❖ Outcome

1. **70%** reduction in time spent on generating reports
2. **80%** more accurate coverage of relevant information in coverage report
3. Reduction of **500 pages of documents into crisp 20 page** summary.

❖ Solution

1. **Maintenance Coverage Assistant** – Bespoke reports across very diverse information during earnings season.

[Example: Nvidia Report](#)



❖ Testimonial

“Needl.ai significantly reduced our time spent in analyzing our portfolio companies during earnings season and we made decisions on adapting our portfolio weightage with confidence without any FOMO.”

– Fund Manager

Success Stories in Business: Institutional Sales

Company: Leading Banking and Financial Services Company

❖ Challenge

Institutional sales team struggled to increase AUM, unable to identify liquidity events in a timely manner.

1. **Fragmented Data** – Vital updates getting lost across diverse media channels.
2. **Time Sensitive process** – Significant time spent gathering and analyzing data manually.
3. **Opportunity Loss** – Missed sales prospects from inability to swiftly identify trends.

❖ Outcome

1. **30%** improvement in AUM.
2. **50%** less time spent in tracking and looking for liquidity events.

❖ Solution

1. **Sales Assistant** – Custom classifiers, which improve sales team workflows with actionable analytics and contextual guidance.
2. **Reports Assistant** – Optimized reports on funding, capex, and similar relevant liquidity events.

❖ Testimonial

“Needl.ai helped our sales operations by harnessing the potential of AI and intelligent automation. Building on this, the Department aims to further capitalize on Needl.ai’s capabilities to drive continuous enhancement and innovation.

– Institutional Sales Head



The Future: Why Choose Needl.ai



We Build with You
[**CONSULTATION + CUSTOMIZABILITY**]



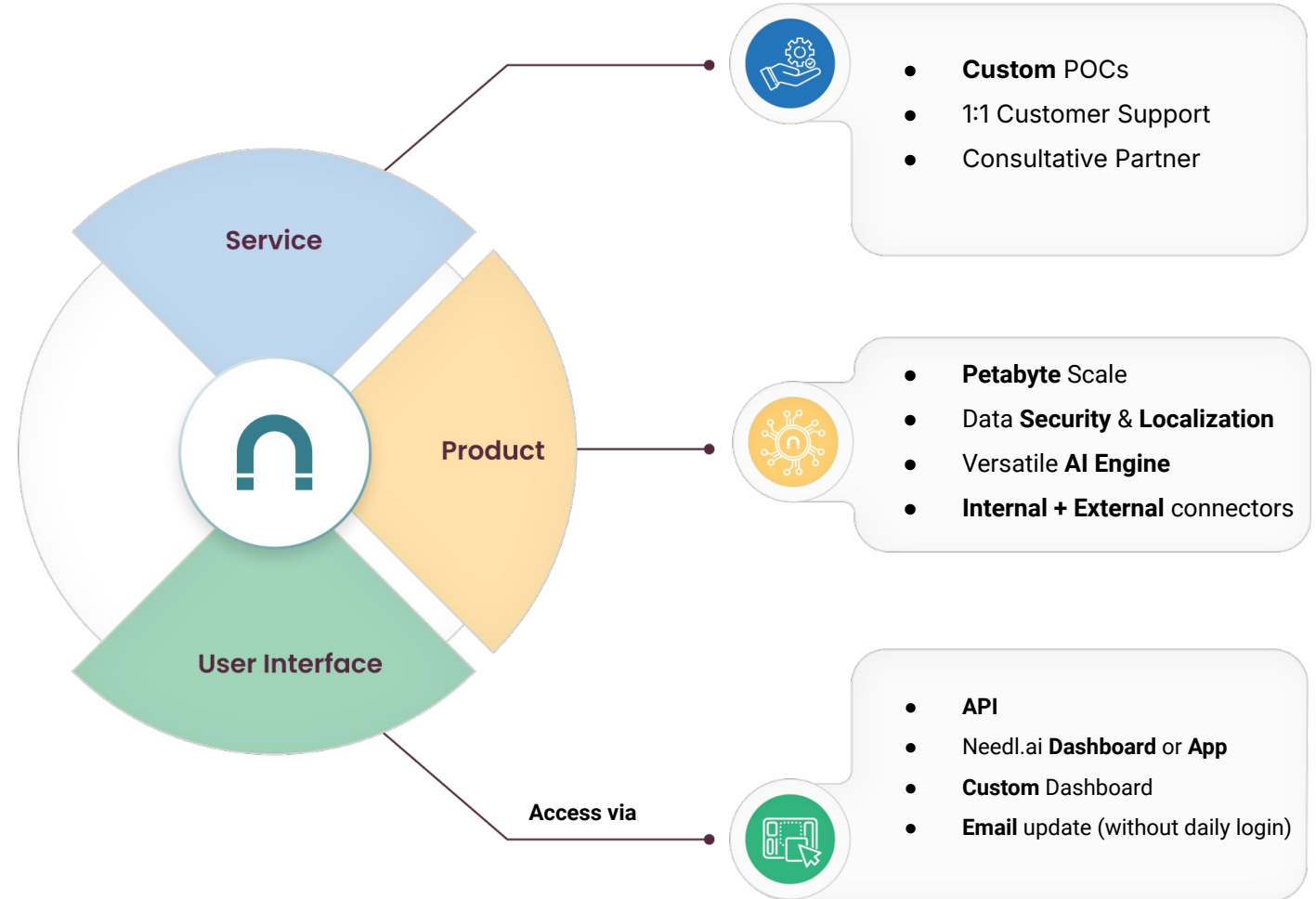
We offer Affordable Scaling for your
[**PETABYTE SCALE**]



We are built for Enterprise
[**SECURITY & LOCALIZATION**]



We offer Flexibility
[**USER INTERFACE/ CLOUD/ LLM**]



THANK YOU

Transform your data management and decision-making with [needl.ai](#)

AVAILABLE ON



WEEKLY NEWSLETTER



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sales@needl.ai

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