ORBIT

ReThink the Impossible

Orbit is an AI-powered platform for financial services, combining an AI Studio with a comprehensive knowledge base giving you an accuracy, transparency, and efficiency that was previously thought impossible.

We are built to enhance your GenAI strategy allowing you to focus on what really matters.

Market Trends

87% of IT Leaders viewed Unstructured Data as a top priority and **65%** of organisations plan to or are already delivering unstructured data into their big data analytics platform

Source: Komprise – State of Unstructured Data Report

"Most organisations have traditionally focused their data efforts on structured data, **but the real value from LLMs comes from their ability to work with unstructured data sources"**

Source: Mckinsey – A GenAI Reset

83% of Wealth and Asset Managers are investing in GenAI currently (48%), planning to invest in the coming years (35%)

Source: EY - GenAI in Wealth & Asset Management

Regulatory ambiguity (62% of respondents), Unclear on the impact of use cases (44%) and lack of trust of using external data (38%) were cited as the top 3 key concerns with adopting GenAI

Source: EY - GenAI in Wealth & Asset Management

About Us

01 Founded in 2015 with a single goal – **Harness AI to unlock the value of unstructured data within financial services**

02 We help our clients accelerate their Generative AI journey across numerous Use Cases

03 We do this by taking a data first approach – **delivering structure to unstructured data**.

04 Like our platform & AI Models, we offer complete transparency in our pricing policy.

MOODY'S   FACTSET.   ISC Investment Solutions Consultants

Microsoft AI Cloud Partner   OpenAI

Orbit in Numbers

71,000 Company Coverage

40+ Global Exchanges

40,000 Dedicated Web scrapers

20,000 Aggregated News Sources

45+ Integrated AI Models

178,500+ Documents processed per day

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...."In managing the first equity investment fund to target AI thematically, we have been pleased to work with the team at Orbit.

Their platform, alongside our investment design and implementation, has helped us to deliver one of the strongest investment track records in the world over the past 3 years"....

Chris Ford, AI Fund Manager
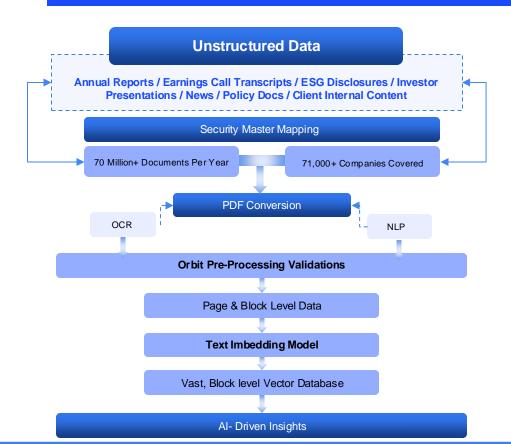Sanlam Investments UK

Sanlam

Our Clients

02

The Orbit Difference

Orbit operates a Retrieval-Augmented Generation (RAG) platform

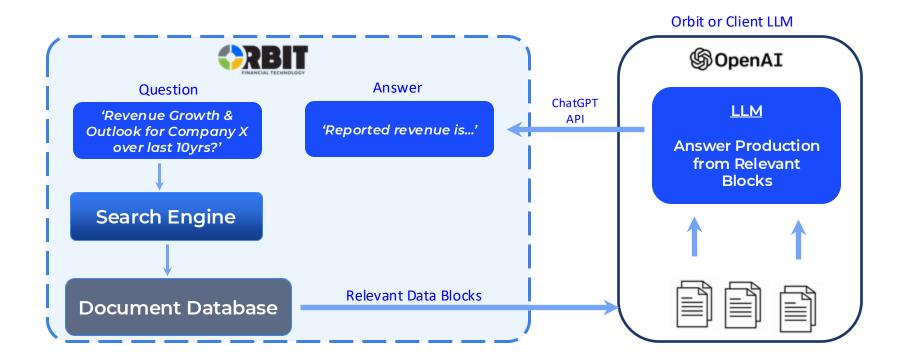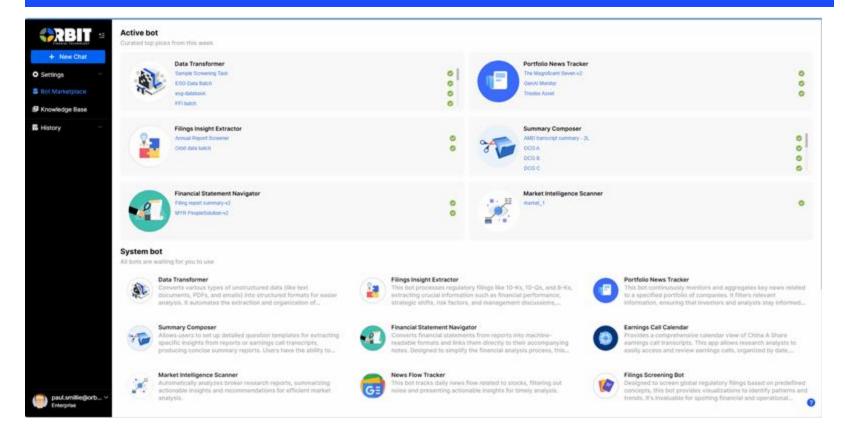Large Language Model (LLM) Accuracy is built on the data it utilises

Data Pre-Processing

Unstructured Data

Annual Reports / Earnings Call Transcripts / ESG Disclosures / Investor Presentations / News / Policy Docs / Client Internal Content

Security Master Mapping

| 70 Million+ Documents Per Year | 71,000+ Companies Covered |

PDF Conversion

OCR

NLP

Orbit Pre-Processing Validations

Page & Block Level Data

Text Imbedding Model

Vast, Block level Vector Database

AI- Driven Insights

Locked Value

Global Data Collection

Text & Data Extraction

Quality Assurance

Data Processing

Enhanced Processing For LLM

Insight and value

RAG System Process

Ensuring Accuracy through Transparency

02

The Orbit Solution

Automate investment Research, Screening,
Sustainable Due Diligence – Integrate GenAI

Off-Platform Data Service

Orbit Insight – Automating Research & Screening

1. Idea Generation

Orbit Copilot
Semantic Search
Document Chat
Upload internal docs &
research for a holistic view

2. Stock Screening

Thematic Screening
Screening on multi defined
Criteria

Investment Process in 5 Steps
1 Determining Investment Policy
2 Performing Security Analysis
3 Constructing Investment Portfolio
4 Revising the Portfolio
5 Evaluating the Portfolio Performance

4. Alerts & Reporting

Stock Screening Criteria matches
Portfolio News Reports
Alerts on material filing summaries
Email distribution lists

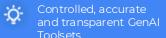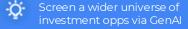## 3. Portfolio Analysis & Monitoring

Exchange Filing Summary
Transcript insight and sentiment
News Monitoring
Earning Call Calendars
Fundamental & Corp Action Data

KEY BENEFTIS

- Controlled, accurate and transparent GenAI Toolsets
- Significantly reduce manual effort associated with portfolio due diligence
- Screen a wider universe of investment opps via GenAI
- Workflow automate summaries, recommendations, screening criteria
- Seamlessly package & structure LLM's based on your own research criteria

Orbit Insight – Automating Research & Screening

1. Idea Generation
- Orbit Copilot
- Semantic Search
- Document Chat
- Upload internal docs & research for a holistic view

2. Stock Screening
- Thematic Screening
- Screening on multi defined Criteria

3. Portfolio Analysis & Monitoring
- Exchange Filing Summary
- Transcript insight and sentiment
- News Monitoring
- Earning Call Calendars
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- Stock Screening Criteria matches
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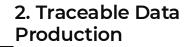- Seamlessly package & structure LLM's based on your own research criteria

Orbit Insight – Sustainable Research & Data

1. On-the-fly ESG Research

- Semantic Search – factcheck market data
- Pre-engagement reporting
- Research companies on restricted lists

2. Traceable Data Production

- Instant data generation across multiple frameworks
- Low latency Data availability within 24hrs of company filing
- Trace all data back to official source

4. Investment Stewardship

- Automate monitoring of thousands of company's vs ESG frameworks
- Seamless matrix generation – leaders & laggards
- Personalised company & peer analysis reporting

3. Bespoke ESG Ratings

- Workflow controlled ESG ratings vs in-house / market frameworks
- Set on scoring system, weightings & materiality settings
- Reporting & alerts

KEY BENEFITS

- Controlled, accurate and transparent GenAI Toolsets
- Significantly reduce Cost & manual effort associated with ESG Research & monitoring
- Instantly trace all data back to official company source
- Low latency for all ESG Data & research – within 24hrs of underlying disclosure
- Automate a personalised approach to ESG Due diligence & monitoring