

# 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



# Our Clients



BLACKROCK



SRS



# 02

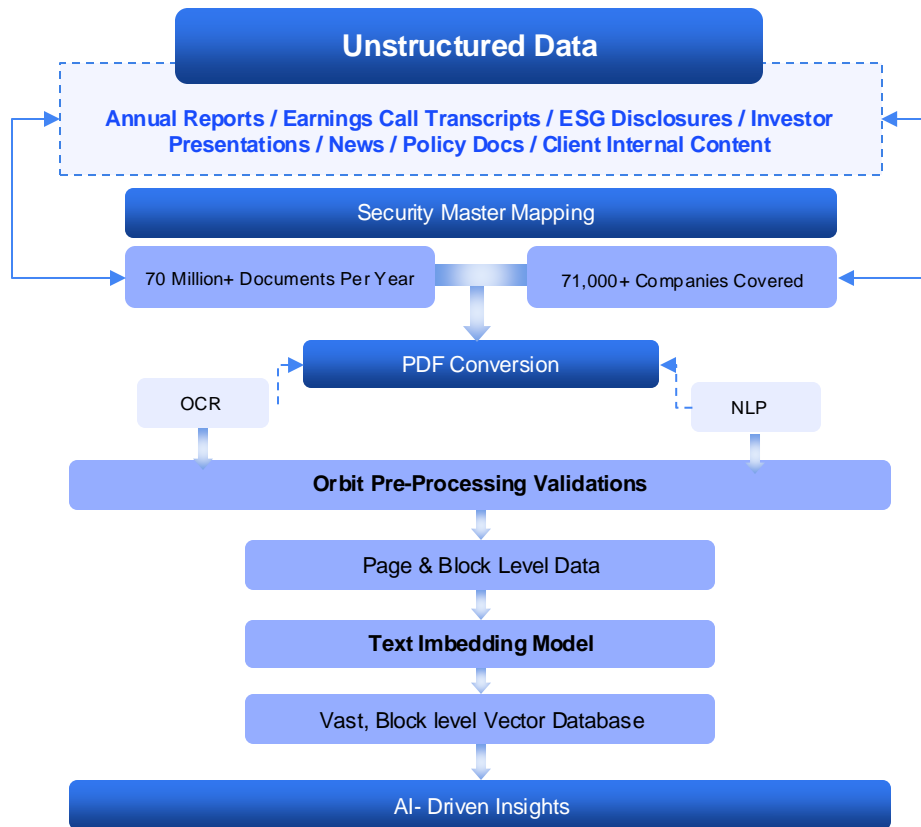
## The Orbit Difference

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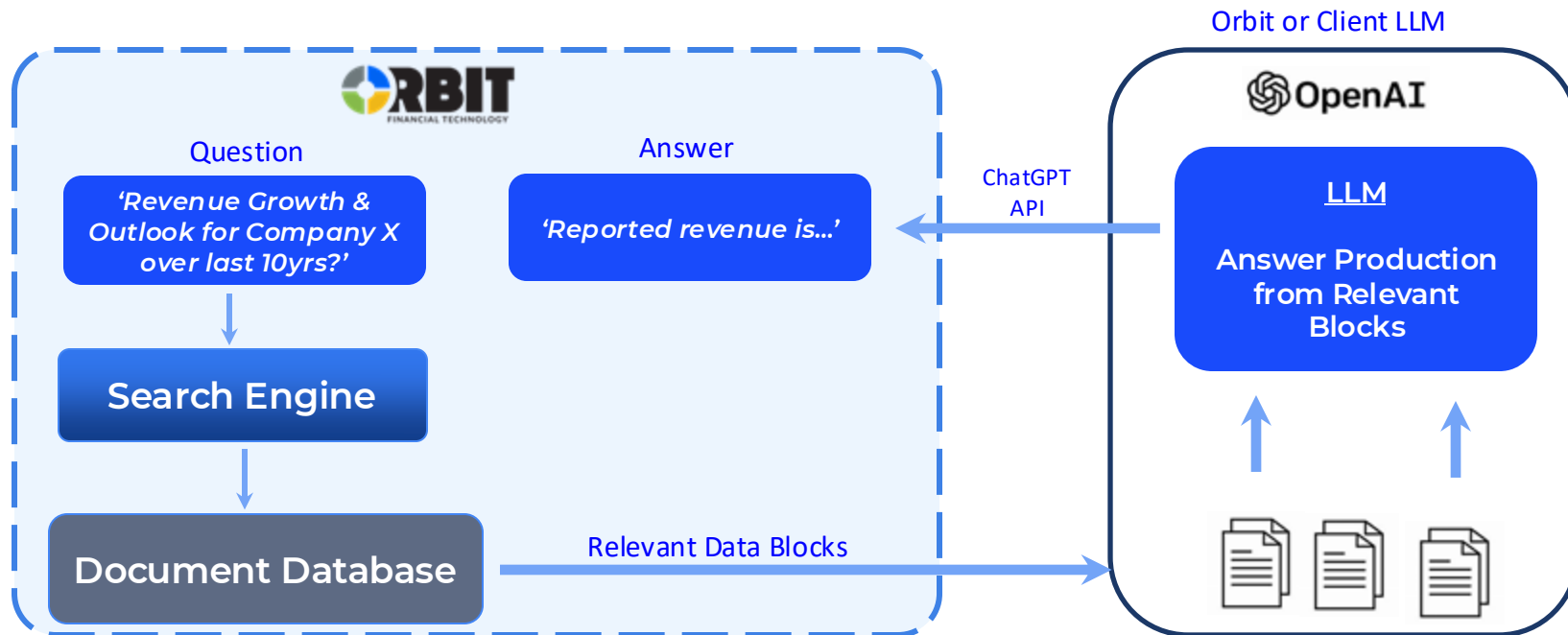
Orbit operates a Retrieval-Augmented Generation (RAG) platform

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


# Data Pre-Processing



# RAG System Process



# Ensuring Accuracy through Transparency




New Chat

Settings

Bot Marketplace


Knowledge Base

History



Active bot

Curated top-picks from this week




Data Transformer

Sample Screening Task

EDD Data Batch

eng-database

PRN batch




Portfolio News Tracker

The Magnificent Seven v2

GenAI Monitor


Tridox Asset



Filings Insight Extractor

Annual Report Screener

Orbit data batch




Summary Composer

AMD transcript summary - 2L

DCG A

DCG B


DCG C



Financial Statement Navigator

Filing report summary v2

MYR PeopleSolution v2




Market Intelligence Scanner

market\_1


System bot

All bots are waiting for you to use




Data Transformer

Converts various types of unstructured data (like text documents, PDFs, and emails) into structured formats for easier analysis. It automates the extraction and organization of...




Filings Insight Extractor

This bot processes regulatory filings like 10-Ks, 10-Qs, and 8-Ks, extracting crucial information such as financial performance, strategic shifts, risk factors, and management discussions...




Portfolio News Tracker

This bot continuously monitors and aggregates key news related to a specified portfolio of companies. It filters relevant information, ensuring that investors and analysts stay informed...




Summary Composer

Allows users to set up detailed question templates for extracting specific insights from reports or earnings call transcripts, producing concise summary reports. Users have the ability to...




Financial Statement Navigator

Converts financial statements from reports into machine-readable formats and links them directly to their accompanying notes. Designed to simplify the financial analysis process, this...




Earnings Call Calendar

Provides a comprehensive calendar view of China A Share earnings call transcripts. This app allows research analysts to easily access and review earnings calls, organized by date...




Market Intelligence Scanner

Automatically analyzes broker research reports, summarizing actionable insights and recommendations for efficient market analysis.



News Flow Tracker

This bot tracks daily news flow related to stocks, filtering out noise and presenting actionable insights for timely analysis.



Filings Screening Bot

Designed to screen global regulatory filings based on predefined concepts, this bot provides visualizations to identify patterns and trends. It's invaluable for spotting financial and operational...

# 02

## The Orbit Solution

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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



## 4. Alerts & Reporting

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

## 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  
Fundamental & Corp Action Data

## KEY BENEFITS

- 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

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- Document Chat
- Upload internal docs & research for a holistic view

## 2. Stock Screening

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- Screening on multi defined Criteria

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# Orbit Insight – Sustainable Research & Data

## 1. On-the-fly ESG Research

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

## 4. Investment Stewardship

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

## 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

## 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

