



SCALATI





Generative AI for Credit Markets

At Scalata we redefine how financial workflows are managed by using Gen AI.

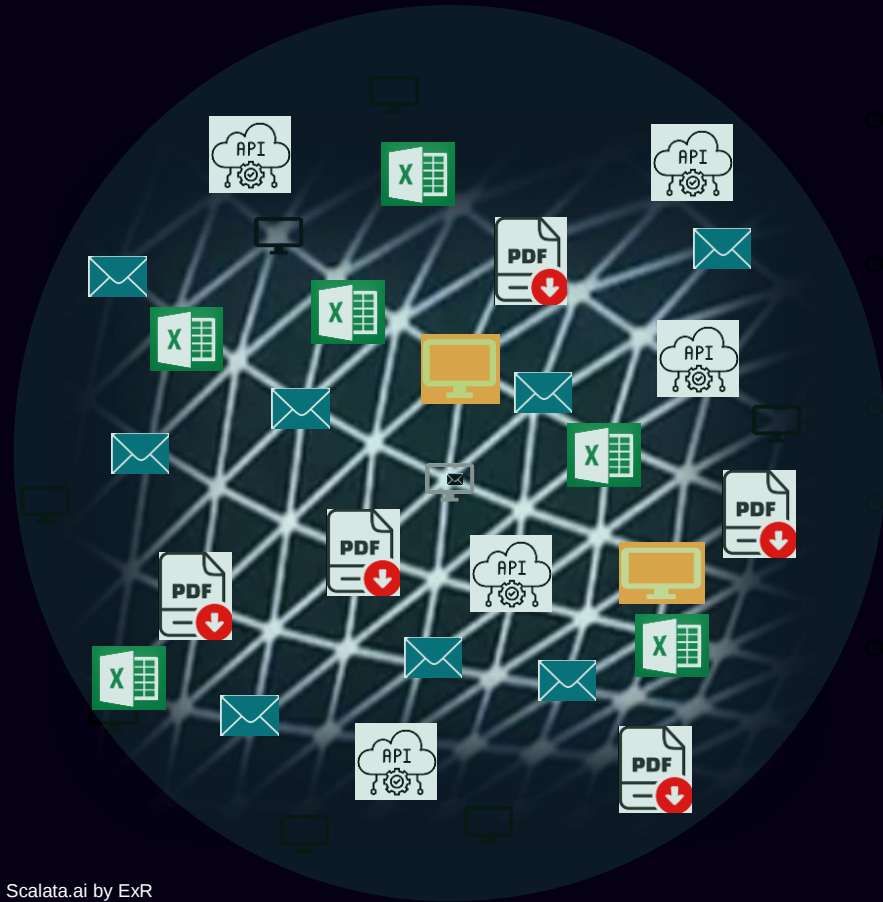
Our end-to-end workflow platform seamlessly connects every stage of the credit process, from data collection to analysis and management.

Data Transformation
at Scale

Accelerating Workflows
with Intelligence

Innovating
Complex Finance

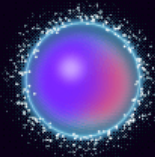
Credit Decision Making is Challenging



- Learning a workflow or tool requires significant time and skill investment.
- Most credit workflows rely on files and emails, leading to inefficiency and errors.
- Skills and IT infrastructures are costly to maintain.
- Open Banking and AI have increased the volume of unstructured and unformatted data & APIs.
- Disparate data structures and sources create major challenges and inefficiencies in data management between counterparties.

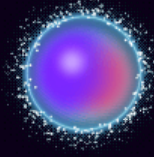
Financial teams waste 80% of their time on manual tasks.

We give that time back and 10x efficiency using best in class AI tooling



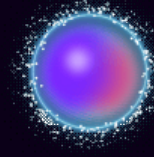
Data In

- Mapping
- Data Engineering
- Normalization
- Data Governance
- Universal API Data Marketplace
- Foundation Models
- On Demand Fine tuning LLM Models



Data On

- Cash Flow Modeling
- Document Summarization
- Building Structured Products
- Portfolio Monitoring
- Interactive Chat Based Visualization
- Risk Modeling + Scenario Analysis



Data Out

- Investor Reports
- Regulatory Filings
- Portfolio Performance Summaries
- Team workflow automation on AI output
- Deal management on external sharing

Use Cases

Community Bank

Liquidity Management

Problem:

Inability to understand and calculate the solvency and liquidity risk of your managed portfolio due to lack of skills or systems

Our Scalata Solution:

Calculate liquidity risk valuations in seconds of your own portfolios and debt structures and learn the content while using the platform.

Hedge Debt Fund

Performance Monitoring

Problem:

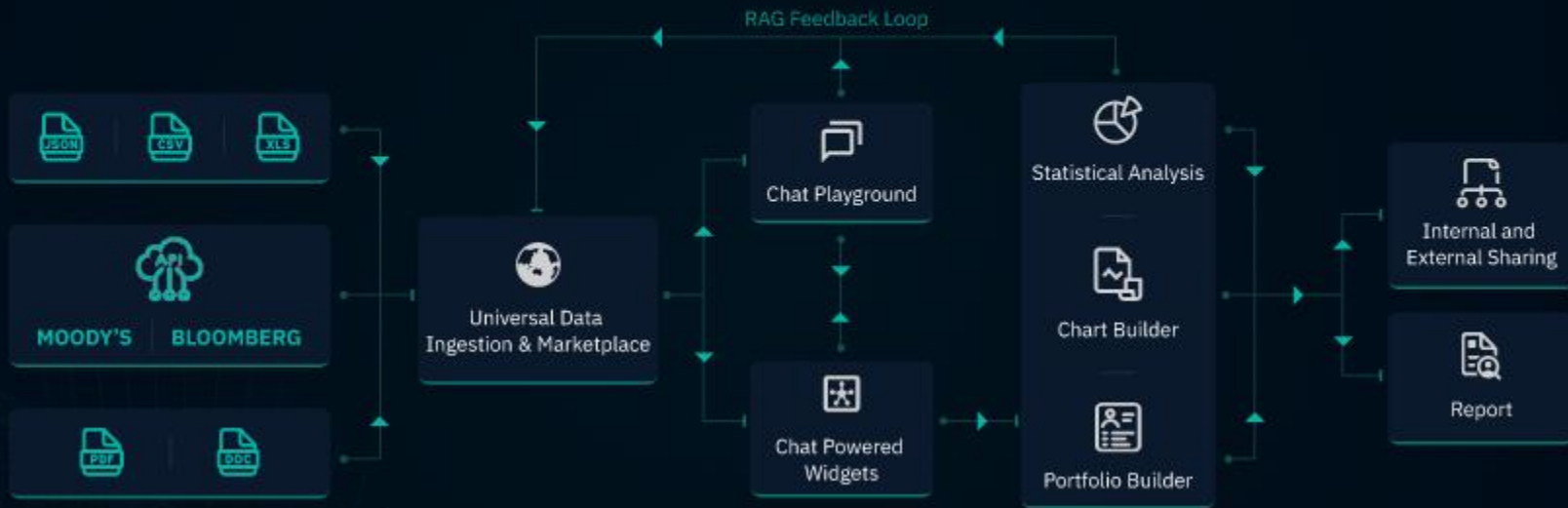
Lack of access to up-to-date financial data, High costs of manual data analysis, Not having the necessary technical skills to take full advantage of AI

Our Scalata Solution:

Developing quantitative models and algorithms, Staying on top of market trends and news, Making profitable trades faster, Identifying and exploiting market inefficiencies

Scalata allows one person to do the work of a team of 5 cross functional teammates

SCALATA



The Scalata Advantage

Data Governance

Scalata is fully built for financial institutions to make use of the latest advances in AI

- Compliance and Information Barriers
- Responsible AI
- User Permissioning of AI and Data
- On Prem Capabilities
- Security



Data Engineering

Designed to make use of any and every data type involved in financial workflows

- Universal Ingestion of files and API and Text
- Data Normalization to any standard
- Multimodal of Foundation Models
- ETL Big Data on Databricks



Knowledge Base AI

Fully model agnostic platform that uses the right model for the right task with a feedback loop that gets better the more an organization uses it.

- AI Agent frameworks
- Anti Hallucination with Feedback loop
- RAG Techniques
- Vectorised Knowledge



SaaS Revenue Model

	Basic	Standard	Enterprise	Premium
Access News	Free	Free	Free	Free
Data Marketplace, Portfolio Credit and AI Playground [*] , ^{**}	No	\$1,000 per monthly User	Included	Included
Structured Finance, Team Collaboration, Deal management	No	No	\$2,000 per monthly user	Included
Platform Reporting, Monitoring & Market Surveillance	No	No	No	\$4,000 per monthly user

Cost of customization of platform resources and usage of big data will be charged on quotas per license.

^{*} Databricks normalization and functions have quotas per month

^{**} Fine Tuned LLM models have customized on off prices depending on the number of users

Our Vision

Our Vision is to enable financial institutions to thrive through scalable, affordable generative AI solutions, orchestrating data discovery and management in the era of exponential data growth of APIs and LLM Foundation models.



Responsible AI

Cost Efficient

Skill Management

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