



AI for Investment Research

Help you secure an information advantage by automatically  
generating investable insights that match your investment  
philosophy.





## Alik Sokolov (MSc, CFA)

Co-founder & CEO

**AI pioneer:** advancing machine learning and Generative AI solutions for finance.

**Thought leader:** published author on AI in finance and ESG, Vanier Scholar (most prestigious Canadian graduate scholarship).

Past: Deloitte, Mithril Capital, University of Toronto



## Vova Golubin

Co-founder & COO

**Sales excellence:** 10-year record of sales excellence and growth.

**Operational excellence:** P&L ownership and building successful, highly effective teams.

Past: HTS, University of Waterloo

# The team

We have a unique mix of expertise in investment management and AI, from academic research to building tangible & pragmatic models and solutions.

## Research Partners



## Omar Khalil (MSc)

Chief Science Officer

**Machine learning research:** proven track-record of solving complex R&D challenges in AI acceleration.

**Machine learning in practice:** leading teams and deploying AI models that drive tangible ROI.

Past: Deloitte, BCG, Untether



## Joseph Hydoski

Co-founder & CTO

**Rock-star engineer:** 10+ years in big data, full-stack engineering.

**Experience scaling technology:** founding engineer at Irwin, a leading Toronto Fintech.

Past: Irwin, Deloitte

Investment firms spend a massive amount of time and effort identifying, aggregating, and analyzing information to make informed investment decisions.

Finding valuable information in **fragmented** and often **commoditized** sources of information is **time consuming and increasingly difficult**.

**400+**

alternative data providers selling **largely commoditized data**.

**~6 hours/day**

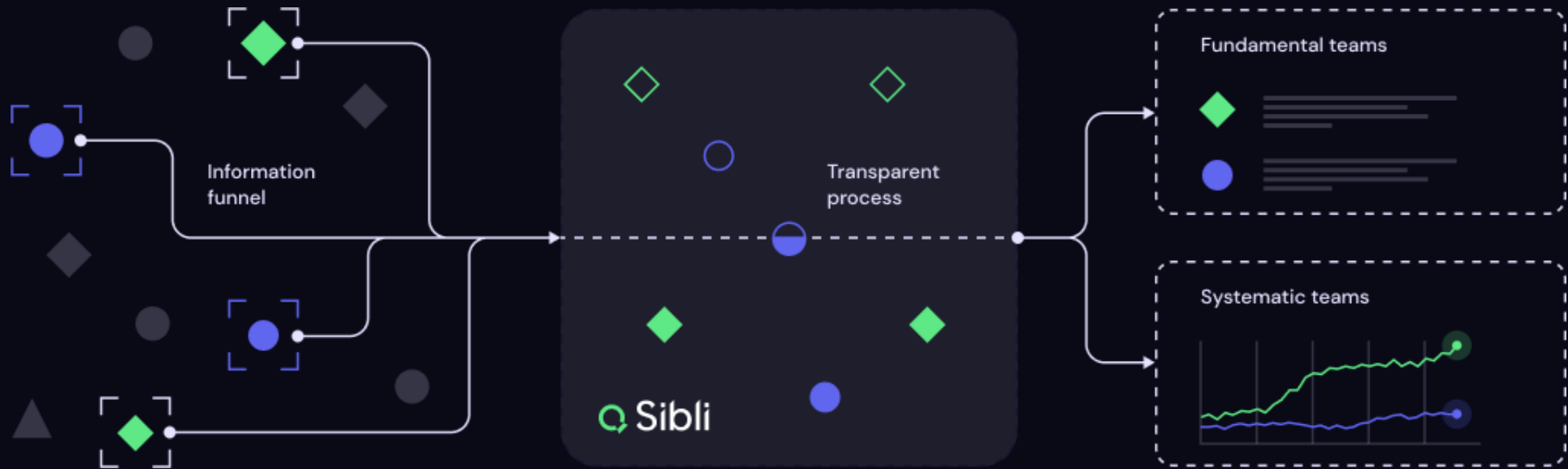
spent reading, sourcing, and **analyzing data**.

**<35%**

of fund products reach the 10-year mark (down from 60% in the 2010's) due to **higher concentration of alpha** and difficulty in **getting an edge**.

Sibli understands your investment research process and delivers insights helping you know more about companies, improving decision making and boosting performance.

Our platform uses Generative AI techniques to surface **insights** by analyzing information from news, social media, disclosures, earnings calls, broker research, and internal sources. Then, the insights are **interpreted and connected** to the strategies carried out by our clients, **giving them an edge**.



### Fundamental teams

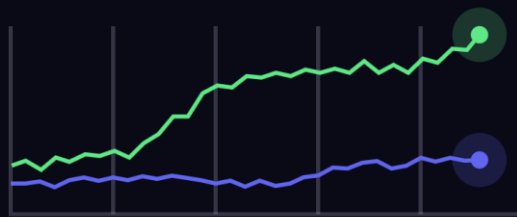


Placeholder text for fundamental team description.



Placeholder text for systematic team description.

### Systematic teams



Sibli Generative AI algorithms and tools focus on **supercharging research**, be it fundamental or quantitative, allowing investors to cover more ground and access data to reflect their own ideas.



# Fundamental teams

## Workflow

Define and monitor any trends and events, such as supply chain disruptions, new product launches, competitive pressure, etc.



**Receive insights** that reflect your thesis and link directly to build-up of companies, seamlessly integrating into your decision-making process.



## Benefits



**Accelerate the identification** and interpretation of events, boosting productivity.



**Uncover blind spots** by processing more information while maintaining quality.



**Expand the boundaries of coverage** attainable by traditional means of research.



# Systematic teams

## Workflow

Define and monitor any trends and events, such as supply chain disruptions, new product launches, competitive pressure, etc.



Receive additive time series and scores as a data feed or directly license our model building technology for internal use.

## Benefits



**Reduce the time** it takes to test and launch a new signal into production by rapidly producing high quality data.



**Create novel, Generative-AI enabled, signals** to improve existing strategies or create new ones while avoiding look-ahead bias.



**Save on the cost** of alternative data by building it in-house instead of procuring it through third parties.



# Novel quantitative signals

## The client

A large international asset management firm with strong focus on active and systematic investment management.

**Location:** Europe and North America

**AUM:** USD 100B+

## The goal

To turn investment ideas about certain exposures being alpha-generating into a dataset / signal suitable for a systematic investment strategy.

## The challenge

It was not clear to the client that the desired dataset could be automatically generated due to their needs for accuracy and the computational requirements driven by data size. It could not be solved through extensive internal expertise or through existing external solutions.

## Our approach

### Understand

Develop a deep understanding of the client's vision, desired dataset, and exposures through interviews.



### Create solution

Generate the dataset and help the client get the results and the novel data generation process approved by their Investment Committee.



### Offer continuous support

Continue to deliver the unique dataset that will be used to launch the new strategy in Q2 2024.

Support a new strategic initiative launched by the client to expand the usage of Sibli technology to enable signal generation at scale. This will help them simplify aspects of alternative data acquisition and save cost while protecting IP.

## Outcomes



### Cost down 100X+

The computational efficiency of our solution was key in making the data generation process economical.



### High quality

The data we created is of very high quality with 95%+ accuracy, 90%+ precision, and 90%+ recall.



### Practical advantage

Launch of a new strategy in Q2 2024; dataset created using out-of-the-box Sibli tooling in <2 weeks.



### Maintaining the edge

The client created a roadmap to expand the usage of Sibli technology to support generation of new signals as well as creating a subset of alternative data in-house, saving costs on third party data acquisition.

# Comprehensive solution to ESG rating

## The client

A financial services and rating company focused on enhancing its Environmental, Social, and Governance (ESG) and impact rating process.

**Location:** North America

## The goal

To boost revenue by scaling company coverage through automation of data monitoring and event interpretation by research analysts.

## The challenge

The client's sophisticated rating methodology requires news and social media coverage, data aggregation, and interpretation that requires specialty training and is difficult to scale. Difficulties in promptly monitoring and updating company ratings.

## Our approach

### Collaborate & combine expertise

Merge our technology and domain in controversy monitoring with client's rating methodology to craft detailed data flows and inferences, transferring significant workloads from analysts to algorithms.



### Support the analyst

Provide the client with an ongoing data feed. Support analysts with insights which are interpreted based on the client's defined methodology, allowing the analysts to validate information instead of searching through data and building insights bottom-up. Moving from building to reviewing insights saves analysts time and allows them to focus on more cerebral research tasks.

## Outcomes



### 2X research efficiency

By automating monitoring required by the client's rating methodology, the analysts can review 95% less events and spend 50% less time on monitoring.



### Efficient company onboarding

Reduced time for onboarding and rating new companies by up to 35% (30 hours), potentially boosting coverage 1.5X with the current headcount.



### Advanced tagging and labelling

By using our automated topic modeling, the client aligned ongoing monitoring to over 100 categories across 6 groups, creating reports to match their complex internal process. Sibli technology can do this near-instantly, with <2 weeks to customize to the client's unique and sophisticated taxonomy and evaluation process.

# Monitoring for fundamental research

## The client

A prominent North American asset manager, with a comprehensive bottom-up fundamental process aided by in-house quantitative expertise.

**Location:** North America

**AUM:** USD 5B+

## The goal

To remain up-to-date with their coverage universe and industry trends. Develop a technology and process to integrate external developments, such as events or controversies, into their internal views.

## The challenge

A growing volume of information and number of data sources analysts are required to remain up-to-date with for their coverage universe. Lack of time to consume and process all relevant information, resulting in a concern of having blind spots.

## Our approach

### Understand

Interview the client and quickly learn their desired data source coverage and investment process, including their unique view for information prioritization and industry specific analysis.



### Customize solution

Align the outputs of our research pipelines closely with their processes, industry specific analysis / build-up, and their unique view for what information is to be prioritized.



### Monitor

Monitor 1,000,000+ news and social media documents daily and deliver systematically prioritized insights, filtering out noise and prioritizing information based on custom signals developed for the client to align closely with their “quantamental” process.

## Outcomes



### A better research process

Ability to pool multiple data sources together, reducing information overload and aligning data feeds to the industry-specific research process, boosting productivity and limiting blind spots.



### Saving 45min/day

Able to save 45 minutes per analyst per day by reducing redundant reading through aggregating, interpreting events, and comparing external information with internal views.



### Greater benefit

The initial focus on ESG research and controversy monitoring is now being expanded to optimization of general fundamental research process.

Some of the world's most sophisticated institutional investors leverage our technology to secure an information advantage.



# How we engage



## Initial assessment

Review existing investment process.

Identify opportunities for value creation.

Define success criteria for a Proof-of-Concept and ongoing technology usage.



## → Proof of concept (1-2 Months)

Customize the technology based on desired outcomes.

Evaluate sample insights against the success criteria.

Continue towards implementation, refine objectives, or exit the process.



## → Implementation

Test and deploy final product.

Monitor and maintain operation.

Explore new opportunities.



# Maintain your edge with Sibli



## Efficiency by design

Rooted in scientific research, our insight generation tools are extremely computationally efficient and designed for investment research.



## Bespoke innovation

Custom-tailored solutions, including deployments in client environment, to help you create truly unique data without compromising your IP.



## Cost-efficient transformation

Generative AI can be cost-prohibitive when used at scale; our technology solves this problem providing the power of LLMs at scale at 100x less cost.



# Thank you!

[Schedule a conversation](#)

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