

Ainstein Portfolio IQ

With AI –

- Ainstein improves and simplifies Portfolio Management – and offers AI-Enabled Rebalancing.
- Ainstein includes Personalized Expert Guidance – Disciplined, fully transparent and explainable.
- Ainstein empowers people to *truly be informed and take informed action!*

Ainstein Cubes show “Before” and “After” steps with a recommended path to improve and derisk Portfolios.

Who can Benefit?

Investors at All Levels – and Advisors!

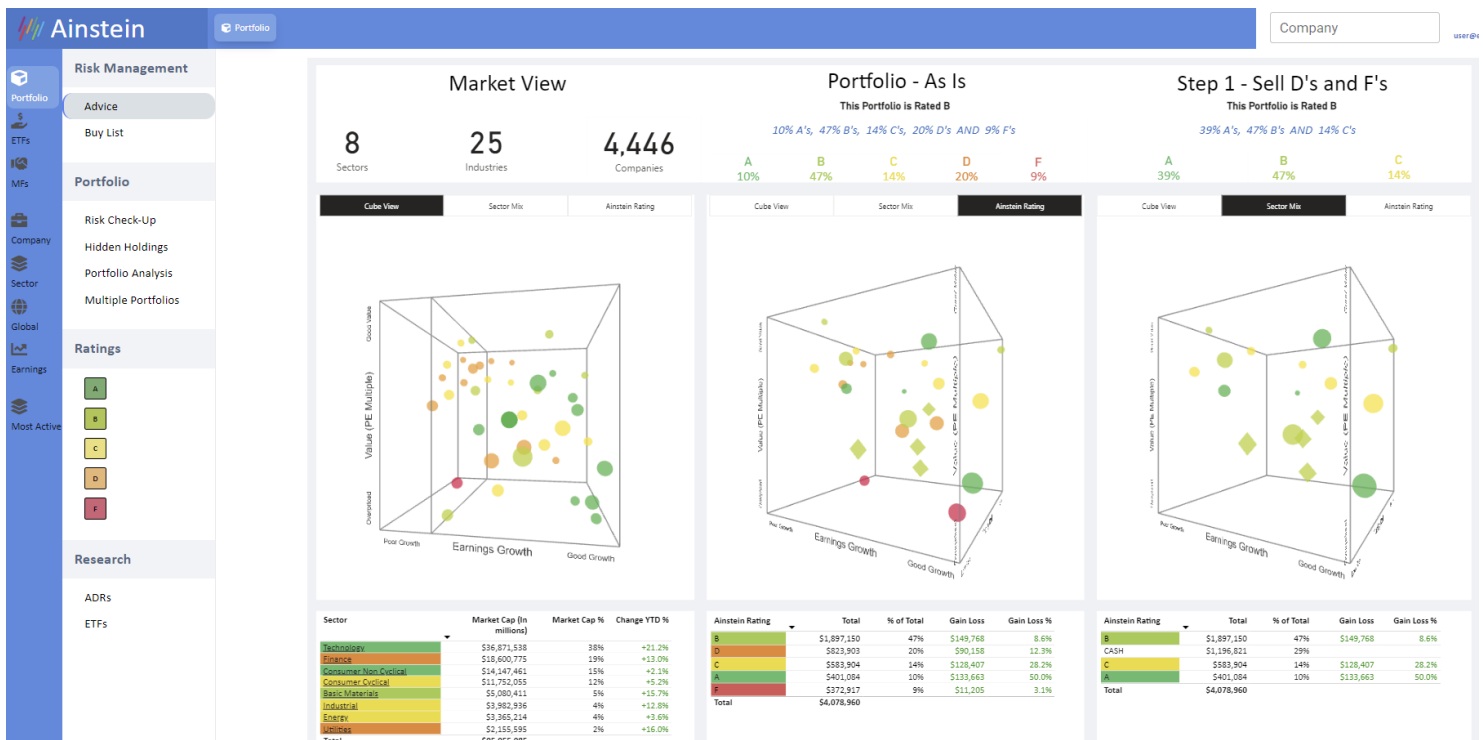
1. Advisors

- 1) Ainstein brings you trust, control, efficiency and mastery, with access to expert resources.
- 2) Cubes streamline communications – helping you lift client service and simplify collaboration.
- 3) Because Ainstein does some of your work – you can help more clients!
- 4) Demonstrate your value-add to clients – with Ainstein’s clarity and transparency.
- 5) It is easier for clients to take action when they see the validating decision steps.

2. Self-Directed Investors can access highly expert Research Resources – out of reach today even to HNW.

3. Brokerage Customers large and small – from RIAs to Family Offices – will appreciate having the AI-Agent Assistant there to answer questions and explain at every step, plus Ainstein’s Recommendation Engine.

4. Financial Institutions – Enterprise Clients can offer Ainstein as a new level of Client service and support – fully compliant and secure.





See personalized Portfolio risk and performance patterns instantly?

"Yes - Cubes are such an improvement!"

Risks fade when Asset Managers have the support of Ainstein Agents!

Ainstein Visualizations show experts (and novices) how to act with new clarity for improved returns.

Professionals can reduce risk and eliminate repetitive work, an especially powerful dynamic when operating under the daunting pressure of Earnings Season.

1. Portfolio IQ

- Cubes reveal Portfolio Risk and help Asset Managers at all levels shift to predictive vs. responsive behaviors.
- When emerging and hidden patterns are easier to see, taking action to lock in Alpha is also easier – and by orders-of-magnitude - being assisted by an intelligent intrinsically systematic process.

2. Earnings IQ

- Earnings Season is the #1 risk, #1 time waster and #1 source of time pressure harrying Asset Managers. Earnings Season is a source of immense concern quarter after quarter.
- Ainstein reveals complex underlying Earnings patterns instantly and reduces the need for 1-on-1 intervention and data creation.
- Offload work and rely on Ainstein to process and present key decision criteria around Earnings Reporting. Improve risk management fundamentally.
- Transform and simplify up and down collaboration too, with self-evident / self-explanatory - Cubes.

3. Industry IQ & Ratings IQ - Performant Hierarchies For Benchmarking vs. Peers

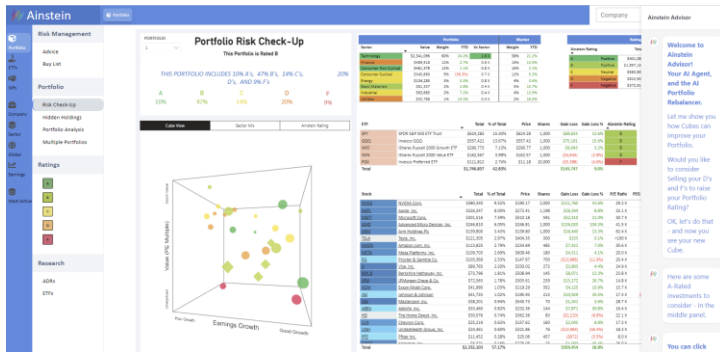
- Ainstein's A-F Ratings and Benchmarking vs. Peers across Hierarchies - Industries, Sectors and Regions - add control and clarity to support success and demystify shifting performance patterns known to drive (and distort) valuation.

People see more with Einstein's Visualizations - and can take action with new clarity, speed and support.

- Predictive Decision Making is Einstein's essential product set.
- Einstein reveals patterns for AI-level anticipation, performance and control.

Einstein AI provides instant at-a-glance insights for unprecedented comprehension, collaboration and communication.

With Cubes, Scoreboards and Risk Ribbons, Ainstein reveals predictive patterns in Visualizations, all supported by fully empirical mastery of complex underlying data dimensionality.



Smarter Decision Making - In Cubes™
Unlocking foundational intelligence for a new world of AI IQ

AI Powered Applications in Technology, Sports, Media & Finance
AI Level Decision Experiences, Intelligent Choices & Competitive Advantages

By Invitation to Select Innovation Partners

Ainstein is AI-Native and a Pioneer in Applied AI
Developed out of MIT