

Ainstein Portfolio IQ - Features

Ratings at 3 Levels:

1. Stocks
2. Funds
3. Industry

Research at 7 Levels:

1. Portfolio
2. Company
3. SubIndustry
4. Industry
5. Sector
6. Country
7. Exchange

Institutional Grade – Institutional Method

Secure

1. All is 100% on Microsoft Azure.
2. No PII (Personal Identifying Information).
3. Encrypted. Multi Tenant.

Ambient Technology – Watching Over

At Scale – Global Coverage

Predictive – Forward Looking

Flexible – Enterprise Customers can Customize

- A. Ratings – Data Inputs are Facts – Not Opinions.
- B. Institutional Customers can simply adjust the Weightings to “Re-Rate” to their Method.
- C. Data Control - Enterprise Customers see their Data (which they have already paid vendors for) as a Custom Instance in Ainstein – combined with other Data – as they like.
- D. Customize Ratings, Data and Dashboards.

Simple Activation

- A. Payment is Direct or to Partners, including Microsoft under Universal License.
- B. No need for Ainstein to be approved as a Vendor.
- C. Enterprise Customers upload Client Portfolios.
- D. Ainstein delivers Personalized Dashboards for each Portfolio.
- E. Club Model. All in one Pricing. Activation and Integration included.

Buy vs. Build AI – No need to Build, Staff or Admin

Ainstein Portfolio IQ – Sound Bites

Ainstein Decision Intelligence Engine Powered by AI - Smarter Decision Making in Cubes™

Unlocking foundational intelligence for a new world of AI IQ

- 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!*

Ingenious – Cubes bring Clarity!

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!

Ainstein AI is Pushing the Boundaries of AI Reasoning and Advancing AI's ability to reason and solve complex problems Autonomously

Ainstein offers AI powered applications in Technology, Sports, Media & Finance.