limeglass

Enhanced
Research Discovery for Wealth Management

➢ Drives 8-28x More Client Engagement

➢ Takes Client Mind-Share from Competitors

Most Innovative Fintech Start-up 2021
Voted Winner by Fixed Income Community

FI Fixed Income LEADERS SUMMIT

IBS Intelligence Global FinTech Innovation Award 2020
Best Original & Adoptable Concept within the category Most Innovative Use of AI/ML

Most Innovative Use of AI/ML
Best Original & Adoptable Concept

The Challenge for Wealth Management in using research

What do Wealth Managers need from research?

▶ Specific content for each client in order to deepen relationships

▶ Demonstrate high content relevance to each client

▶ Distribute where the clients are – chat, messaging, screen share, email....

▶ Become the "go-to" house for particular client types with high degrees of trust

▶ Ability to convert insight into transactions

FT 14/12/23 - Asian Riches Push Private Bankers to Up their Game.

HSBC's Maggie Ng Head of Wealth at HSBC Hong Kong adds that

"there is also a **growing need for portfolio-level advice**, as the sheer volume of information available to anyone at the tap of a finger means clients are more discerning about who they listen to and trust."
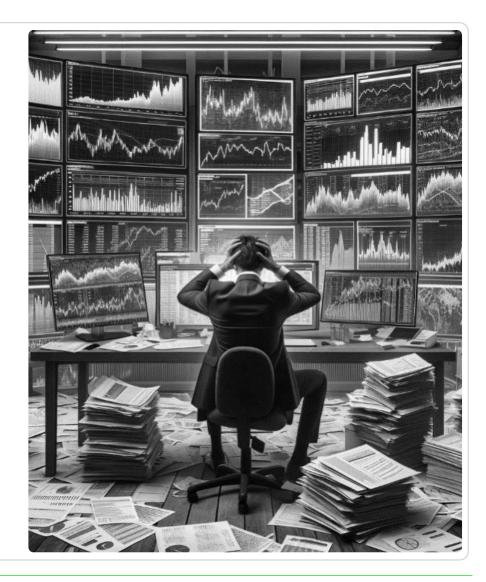
How to cut through the information overload

▶ Wealth managers and clients receive lots of research on a daily basis

▶ You can't read them all

▶ Forget all the individual documents...Limeglass shows you what is trending across all sources

▶ Limeglass assembles just the relevant content across all the documents and in one place.

▶ As a result, Limeglass offers 8-28x impact opportunity

Move away from **Noisy information** overload

Limeglass resolves the overload challenge

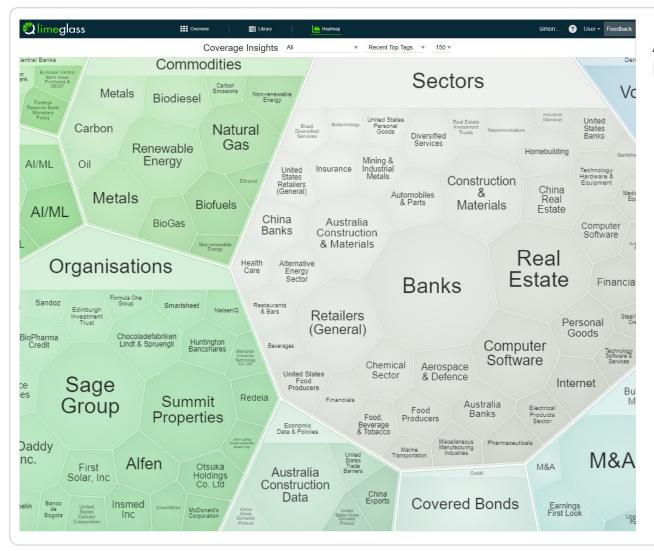Limeglass tools are up to **28 times more powerful** than existing tools

Move towards **Focused information** retrieval

Limeglass addresses these problems

► An easy-to-use front-end to mine all the bank's output in one place

► Proprietary tools to surface the most relevant content

► Cross-match topics interesting to clients in one place

► Through easy to integrate access tools requiring little or no IT integration

► A series of tools to enable your clients to access the content most relevant to them

Limeglass provides clarity on what is trending

An example is a heatmap...

► ...which shows your research topics and how coverage is trending and solves these problems;

  ► What themes to suggest to clients

  ► See at a glance – in one place how these themes are trending

  ► Reduce the time taken to assemble ideas for clients

  ► Showcases the breadth and depth of your content

Limeglass Ltd https://www.limeglass.com

Limeglass is a Fintech with a suite of Research Discovery services for producers & consumers of investment research across the Buy Side and Sell Side.

Why Limeglass?

▶ Limeglass combines AI with human domain expertise to turn research documents into rich, structured data, unlocking a multitude of revolutionary applications.

▶ **Most research providers use less than 10,000 tags/topics/themes – Limeglass uses a core of 50,000 and a further 130,000 for greater refinement.**

▶ This all goes on behind the scenes and enables much finer search levels.

▶ Contact us to find out how we can enable differentiation in the wealth market

sales@limeglass.com
St Magnus House, 3 Lower Thames Street , London EC3R 6HD
Registered England & Wales 09622887
Registered Address: 19 Sispara Gardens, London SW18 1LG

Further Information

Extended Use Case List
Research Discovery: How our clients use Limeglass

Active Discovery

Limeglass Boost = 28x

Find the exact information you need, at paragraph level across multiple documents. Make your research the valuable asset it was always meant to be.

Search
- ▶ Smart Search within documents
- ▶ Find what you're really looking for with Limeglass Augmented Ranking Technology

Browsing
- ▶ Navigate complex content through the Limeglass Portal
- ▶ Browse related content through hierarchical menus
- ▶ Integrate with your own custom Taxonomy
- ▶ Build custom Dashboards for new subject areas

Large Language Model Input
- ▶ Query your research with natural language questions in Limeglass AI Chat

Passive Discovery

Limeglass Boost = 8x

Stay on top of important & relevant content. Never miss valuable research insights. Reduce information overload.

Distribution
- ▶ Automate richer, more consistent tags for distribution & subscription preferences
- ▶ Generate compilation products
- ▶ Enable micro-publishing

Topic Monitoring
- ▶ Surface relevant related content based on reading interests
- ▶ Display trending & most-covered topics via visualisations & notifications

Synthesised Content
- ▶ Provide the most relevant original excerpts for expert summary
- ▶ Provide cleaned, relevant input into LLMs with Limeglass Research Atomisation™

Automated Question Response
- ▶ Batch answer client questions
- ▶ Service clients with research based on CRM notes

Analytics

Limeglass Boost = Unprecedented Data

Understand what's in your research. Mine the data for hidden relationships. Automate cumbersome processes. Make better business decisions.

Coverage & Trends
- ▶ Analyse & compare how much has been written about different subjects
- ▶ Uncover trends in topic coverage over time

Quant
- ▶ Discover interesting correlations through Topic Co-Occurrence
- ▶ Leverage the structured tags & metrics for any custom analysis

Workflow Optimisation
- ▶ Augment Supervisory Analyst & Compliance Pre-Publication processes
- ▶ Manage the research publishing pipeline

Readership Analysis
- ▶ Investigate granular readership interests