

## ARTIFICIAL INTELLIGENCE: INVESTMENT ANALYSTS WITH AI-DRIVEN INSIGHTS AT A LARGE PRIVATE EQUITY FIRM USING RAG LLM

### CLIENT:

A large private equity firm with a notable record of success in alternative investments, serving institutional and individual investors across the risk-return spectrum—in credit, equity, and real assets strategies.

### CHALLENGE:

Navigating investment memos and scattered internal data posed a challenge. Their analysts needed a solution that could swiftly translate this wealth of information into actionable insights, fueling informed investment decisions.

### SOLUTION:

We built an intelligent knowledge center powered by the synergy of Large Language Models (LLMs) and Retrieval-Augmented Generation (RAG). This Azure OpenAI-powered chatbot, specifically designed for investment analysts, would not only store information but also actively engage with users, extracting value from financial content and tabular data within memos.

### OUTCOME:

The AI-powered knowledge center propelled the firm's investment analysis function to a new level of agility and accuracy. With faster decision-making, data-driven insights, and a diversified portfolio, the firm thrived in the competitive private equity landscape.