

AI Agent-led Research & Investment Decision Support

Problem Statement

The research team of a renowned global investment firm struggled with manual, time-consuming investment research and analysis. Sourcing middle-market deals, monitoring portfolios post-close, and generating reports lacked a scalable, integrated platform, resulting in inefficiencies and slower decision-making.

Approach

- Built on Azure with modular agents orchestrated for specific workflows, integrated with Microsoft Fabric, and existing internal systems
- MVP leverages curated, high-signal sources to power real-world use cases

Key Results

90%

reduction in manual effort for research and monitoring

Objective

To build an agentic AI MVP that streamlines middle-market sourcing, enhances post-close monitoring, and lays the foundation for a scalable credit intelligence platform.

Solution

A Next-Gen Investment Research Platform developed to streamline the investment process using intelligent agents for on-demand research, data analysis, and decision support.

- Research Agent:** Identifies high-potential middle-market opportunities by analyzing graphics, financials, and external signals
- Alerting Agent:** Continuously monitors existing portfolio companies and flags performance anomalies

About Straive

As a data analytics and AI operationalization company, we don't just build top-tier data analytics and AI solutions—we integrate them seamlessly into your core workflows. This approach drives enhanced efficiency, improves user experience, and boosts revenue, setting you apart from the competition.

Serving a diverse range of industries—including Pharmaceutical & Life Sciences, Manufacturing & Supply Chain, Science & Research, EdTech, Banking & Financial services, Retail & CPG, GCCs, and Media & Entertainment—we have a global client base spanning over 30 countries.

Our strategically positioned resource pool operates across nine countries: the Philippines, India, the United States, Nicaragua, Vietnam, the United Kingdom, Singapore, South Africa, and Canada.