Case Study

Enterprise AI Intelligence Platform for a Global Asset Management Leader

Problem Statement

A leading global asset manager faced significant hurdles managing millions of research notes, emails, and analyst commentaries. This critical data was largely unstructured and fragmented across siloed systems, preventing portfolio managers from accessing real-time insights. The firm needed a scalable solution to transform this "dark data" into searchable, summarized, and conversationally accessible intelligence for high-stakes decision-making.

Approach

- **Scalable AI Pipelines:** Engineered Azure-based pipelines to process 200K+ unstructured documents, leveraging a zero-trust, zero-data-retention architecture
- **Advanced LLM Orchestration:** Integrated GPT-4o with advanced prompt engineering for high-precision summarization
- **Optimized RAG Framework:** Implemented advanced chunking and Azure AI Search to ensure fast and traceable responses

Objective

To design and implement an enterprise-grade AI system to automatically intake, hydrate, and summarize millions of research documents, providing an intelligent, chat-based interface supporting complex financial queries and text-to-SQL capabilities with total data security.

Solution

Straive delivered a comprehensive Research Intelligence Platform featuring:

- **Intelligent Data Hydration:** Automated ingestion of research emails and documents every 10 minutes, extracting critical metadata, authorship, and sector tags
- **Investment Thesis Generator:** A GenAI summarization engine that transforms raw analyst notes into structured executive summaries and investment theses
- **Conversational RAG Interface:** A chat-based assistant enabling users to query vast financial datasets using natural language, providing cited and verified responses

Key Results

8.5X Cost efficiency

200K+ documents processed

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.

www.straive.com contact@straive.com