

# Leapfrog Your Portfolios with aisot

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Create high-performing, customized portfolios with unprecedented speed and precision.

## Adapting to New Challenges in Asset Management

Independent and external asset managers face a collective challenge: battling shrinking margins and competition from low-cost index products. They are under significant pressure to maintain cost-efficiency and deliver strong investment performance for clients. Achieving market-comparable risk-adjusted returns, while also maintaining a unique investment style and approach, is a significant hurdle for modern asset management firms.

Ultimately, clients demand high-quality service, tailored portfolios that yield results, and all at a competitive price. The complexity and extra workload of reporting processes, combined with unpredictable market conditions, further complicate forward planning for these firms.

## Expanding Horizons: The Rise of Customer-Centric Asset Management

Traditionally, working directly with customers to meet their unique investment needs – encompassing their investment universe, targets, and restrictions – has been resource-intensive. High research costs and reporting overheads previously made it economically unfeasible to offer customized portfolios to affluent and retail customers. And even when working with large institutional customers, portfolio managers often find it hard to create specific value beyond a certain niche.

The advent of automated large data set analysis and modern Machine Learning technology is transforming this landscape. Now, customer preferences can be integrated at minimal additional costs. Automated systems swiftly calculate optimal portfolios, significantly reducing the time and resources required. Asset managers can maintain a unique investment approach by setting the strategy and integrating internal insights with automated systems. This combination allows them to stand out in the market while efficiently delivering scaled investment portfolios.



## The aisot AI Insights Platform – Your Strategy Supported by AI

Aisot Technologies offers asset managers a powerful platform to create high-performing, customized investment strategies. Our interactive aisot AI Insights Platform enables the generation and optimization of portfolios across various markets, utilizing advanced AI technology.

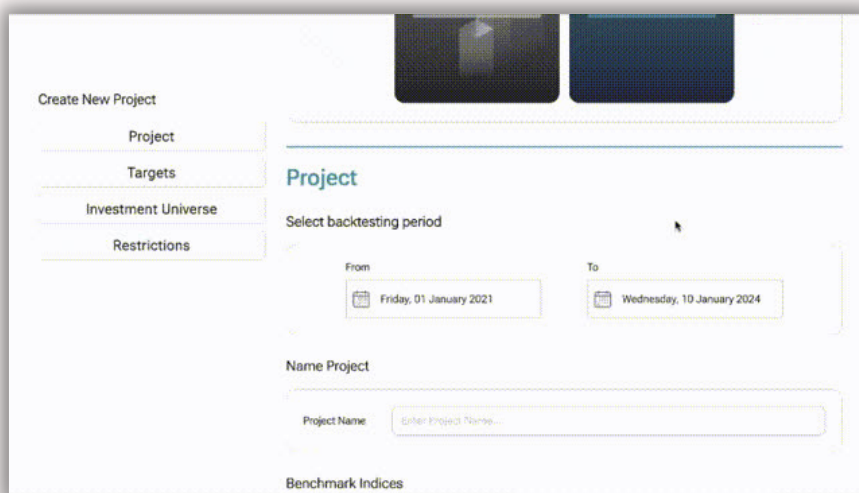
Asset managers gain access to a rapid prototyping tool for Machine Learning and quant-supported strategies, including comprehensive backtesting. The aisot AI Insights Platform enhances efficiency by speeding up the strategy definition process and reducing research costs. It empowers clients to achieve superior investment results, even in scenarios with a limited investment universe or strict restrictions.

The platform provides clear explanations for chosen securities and their weightings, offering insights into why specific titles are selected and assigned particular weights. It also includes tools for discovery, assisting in identifying new investment opportunities, and analytics that cover momentum and other technical indicators.

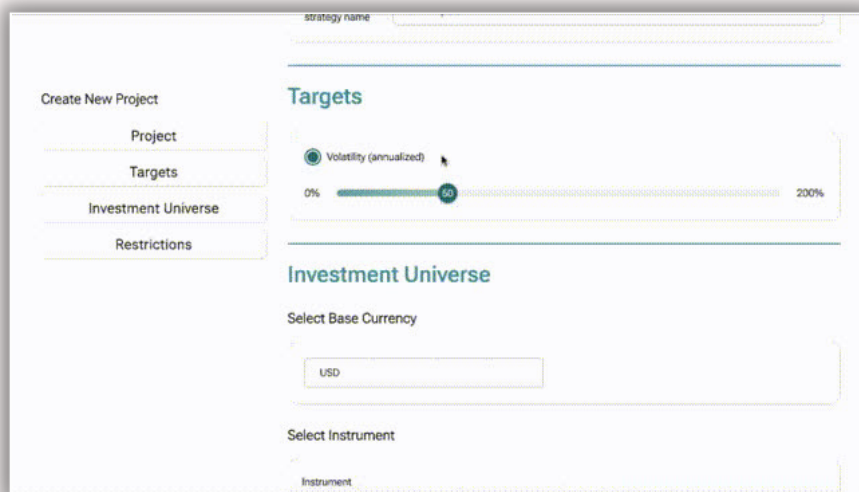
Additionally, the integrated Product Launchpad enables clients to securitize bespoke financial products and thus saving time and money when handling customer portfolios. The portfolio management can even be delegated to aisot and its partner network, providing a comprehensive solution for tailored financial product development and management.

## Select User Interfaces of the AI Insights Platform

Backtesting period & benchmark selection on the AI Insights Platform.



Volatility & instrument selection on the AI Insights Platform.



Performance & composition view on the AI Insights Platform



## This is What You Get with the aisot AI Insights Platform

- **Customized Investment Strategy Creation:** Utilize the platform to develop high-performing, tailor-made investment strategies.
- **Portfolio Generation and Optimization:** Leverage advanced AI technology to craft and fine-tune investment portfolios across diverse markets.
- **Rapid Prototyping Tools:** Access tools for quick development of Machine Learning and quantitatively supported strategies, complete with thorough backtesting capabilities.
- **Enhanced Efficiency in Strategy Development:** Experience a streamlined process for defining strategies, coupled with reduced research costs
- **Superior Investment Results:** Achieve better investment outcomes and downside protection, even when working with a limited investment universe or under strict constraints.
- **Explanatory Insights on Securities:** Gain clear, insightful explanations about the selection and weighting of specific securities in your portfolio.
- **Discovery and Analytics Tools:** Utilize tools designed for discovering new investment opportunities and conducting analytics on momentum and other technical indicators.
- **Product Launchpad Integration:** Access the Product Launchpad to create and manage custom financial products, with the option to delegate management to aisot.
- **Comprehensive Financial Product Management:** Benefit from a complete solution for the development and management of bespoke financial products tailored to your needs.

[Book Your Demo](#)

## About Aisot Technologies

Aisot Technologies AG (aisot) is an official spin-off of ETH Zurich. aisot empowers asset managers to generate risk-adjusted returns with customized investment strategies that adapt to clients' unique preferences across markets, leveraging AI and bespoke financial products. Founded in 2019 and headquartered in Zurich, Switzerland, aisot maintains a network of partners and associates throughout Europe and the U.S.



## Disclaimer

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