



Accelerating Alpha Discovery with
Neuro-Symbolic GenAI: PoC Kick-Off
May 15, 2025

Meet Your Team/Key Points of Contact



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Agenda:

- 30 minutes – Weave.AI Overview & Platform Capabilities
Lisa Kalscheur (CMO) & Sasha Tuel (Technical Solutions Consultant, Fidelity Lead)
- 20 minutes – Weave.AI Platform Demo
Sasha Tuel
- 10 minutes – Q&A and Next Steps
All

Problem: Alpha Discovery is Harder Than Ever



Data Overload

- 80-90% of investment data remains under-analyzed due to scale and complexity

Deloitte.

McKinsey
& Company

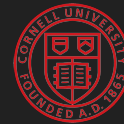
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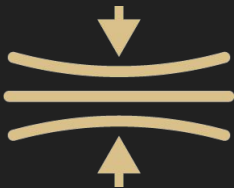
Missed Opportunities

- Manual thesis validation misses early signals, costing firms alpha opportunities

PIMCO



Cornell University



Competitive Pressure

- Your competitors are rapidly adopting AI to gain an edge

47% [C-level executives at financial institutions] report ROI from genAI initiatives exceeds their expectations.

Deloitte,
Feb. 2025

The Hidden Risk: AI Washing and Hallucinations Are Everywhere

— Opinion

The age of AI has dawned – and so has “AI-washing”


Already, we’re noticing a disparity between firms that claim to have artificial intelligence features and those that can genuinely showcase tangible, AI-driven results with complete transparency.

Sonia Haque-Vatcher *Tech risk expert*



Dec 17, 2024 - 11:07am

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This year, 2024, has undoubtedly been the Year of AI. It was the year in which the term “AI” – broadly understood to be the technology that allows for the simulation of human learning and problem solving – was heard everywhere. And it was the year in which the market saw an unprecedented increase in the adoption of artificial intelligence.

From asking AI to write a piece of content in literally a second, to getting it to sift through thousands of documents for the right answer in a nanosecond, artificial intelligence and its subsets – machine learning,



For alpha discovery, context matters: Beware of washed insights

AI-Washed    

"Our revolutionary AI-powered platform leverages state-of-the-art machine learning to transform the future of business, delivering unmatched innovation and redefining success for companies worldwide."

Surface-level token analysis

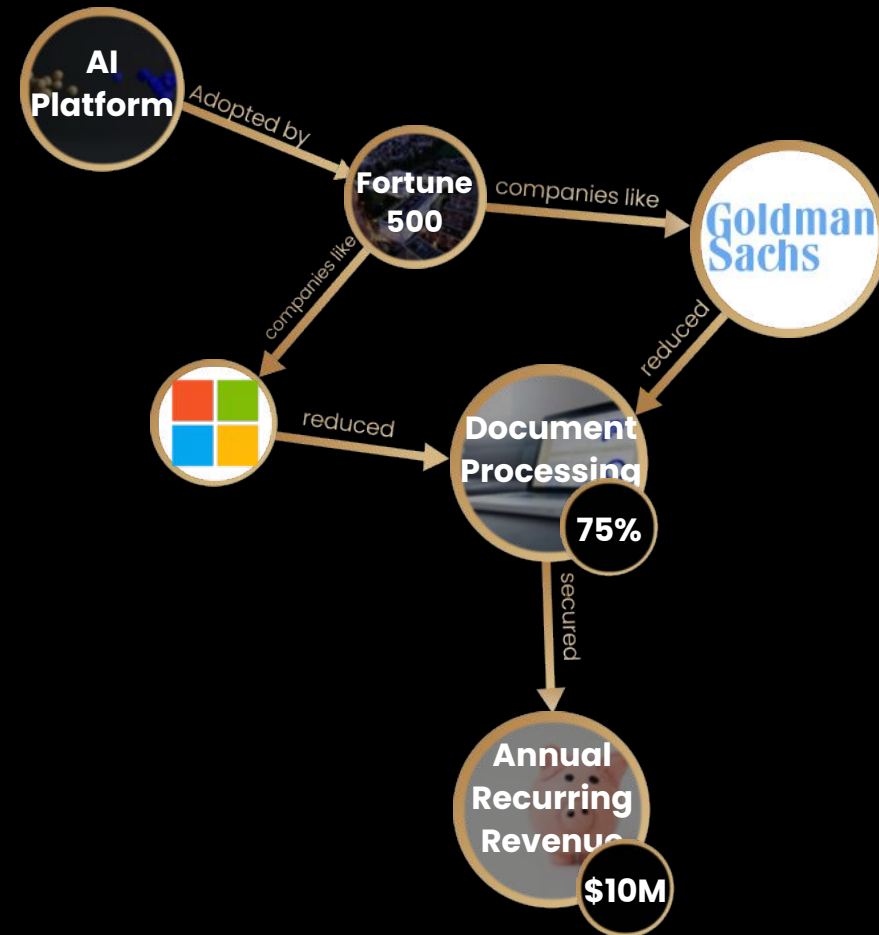
For alpha discovery, context matters: Unlocking material insights

Material AI Accomplishments



"Our AI platform, adopted by Fortune 500 companies like Microsoft and Goldman Sachs, reduced document processing times by 75% and secured \$10M in annual recurring revenue within 18 months of launch."

Deep graph-based analysis



Weave's Solution

Thematic Alpha Insights

AI agents uncover alpha opportunities by analyzing thematic trends

Proprietary Data Integration

Agents synthesize internal datasets (e.g. research notes, portfolio holdings) for tailored benchmarks

Scalability

Agents evolve to support new themes and datasets over time

Real-Time Analysis

Deliver actionable insights faster than traditional methods

DIFFERENTIATION / UNIQUE IP Why Our Agents?

Tailored to Your Theses

Not off-the-shelf tools, but custom-built to align with your proprietary strategies

Unmatched expertise

Built on 15+ years of cross-sector insights and state-of-the-art AI

Exclusivity

Gain a unique edge with bespoke tools no competitor has access to

Next-Generation Agentic AI... Today

Weave.AI GenAI Agents:

1. Insights at market speed
1. Powers deep research & proprietary theses
1. Elevates Fidelity's advisory edge

- ✓ Proactively deliver 360° insights
- ✓ Assess priorities
- ✓ Recommend actions
- ✓ Guide decisions
- ✓ Streamline complex workflows

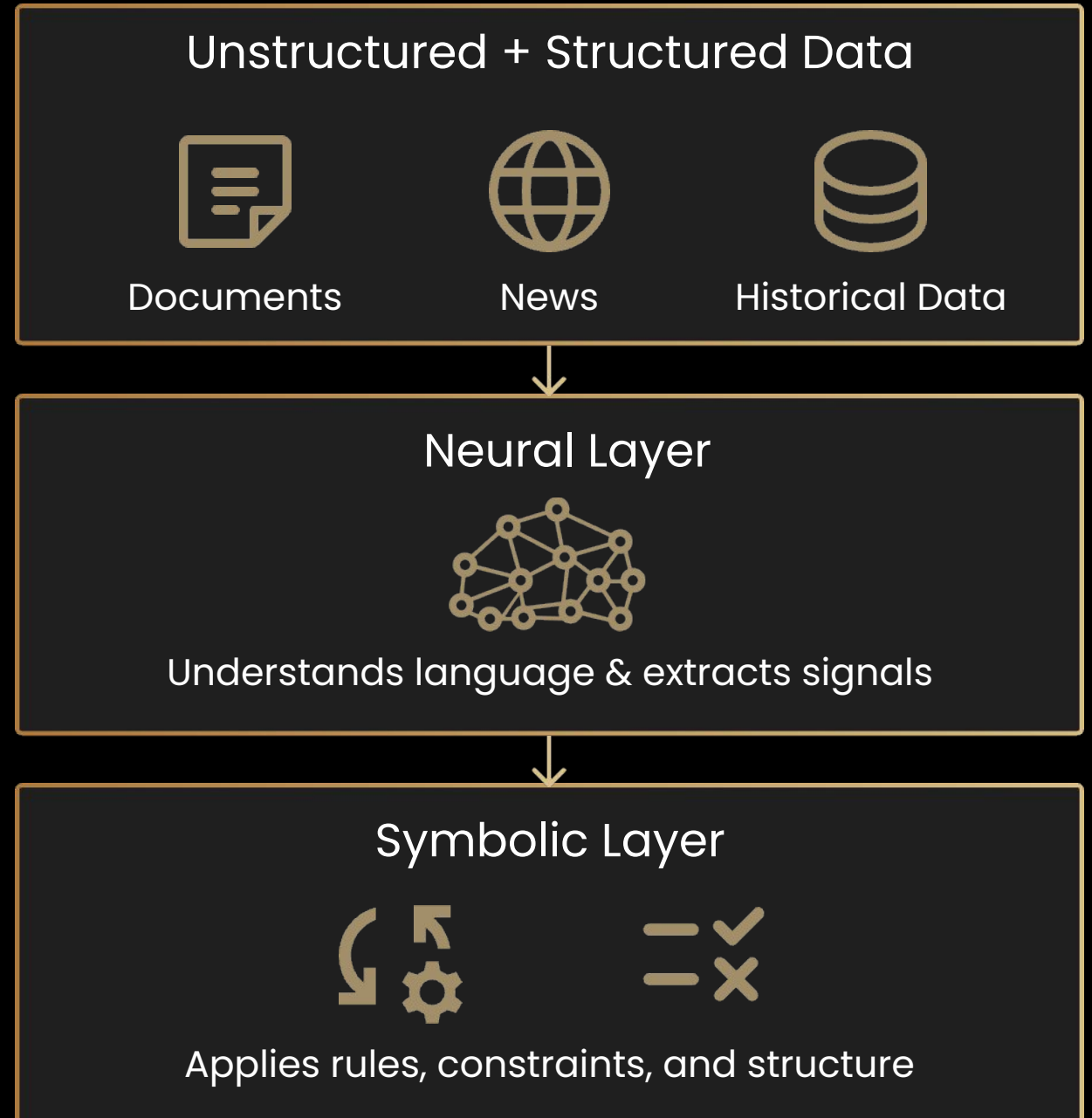


How Weave.AI Works

How Weave.AI works

Why Neuro-Symbolic AI Matters

- Traditional LLMs generate fluid but unverified outputs
- Neuro-symbolic AI ensures every insight is grounded
- The knowledge graph maps critical relationships
- Outputs are **traceable**, **defensible**, and **auditable**

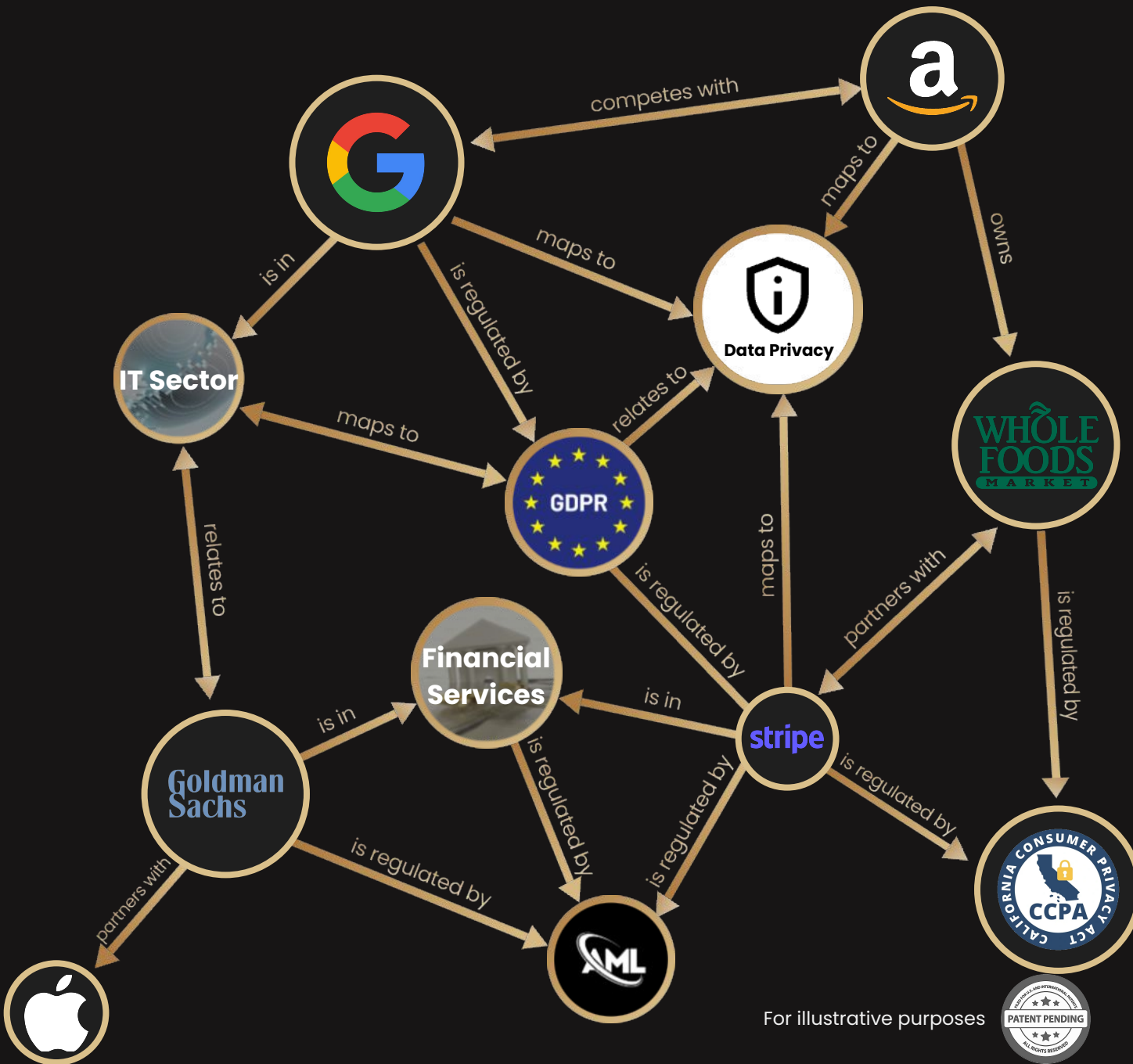


How Weave.AI works

The Weave.AI Knowledge Graph

Proprietary Context Engine for Enterprise-Grade Insight

- Unlike LLMs, it doesn't guess – it reasons
- Backed by a curated, proprietary ontology, custom to asset and portfolio management
- Insights grounded in structured logic—not pattern prediction



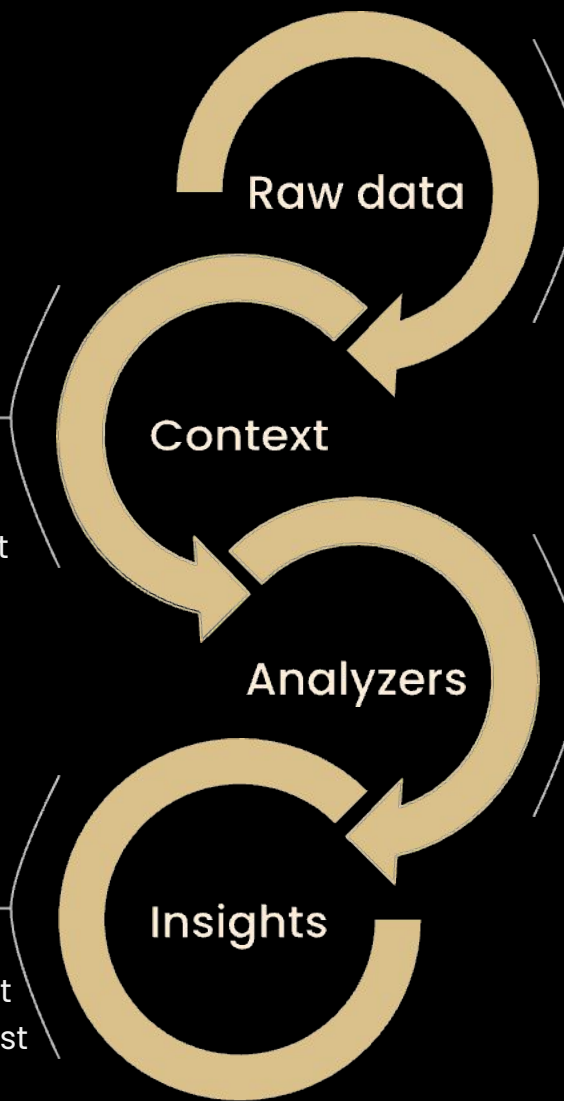
How Weave.AI works

Powered by: Knowledge Graph

- What is happening, and *why* it matters
- From simple prompts to complex domains
- Keywords, topics, market dynamics, investment theses, regulatory frameworks, M&A activity

Dynamic, Traceable Outputs

- Auditable, explainable, no hallucinations
- Unknown unknowns, early warnings, investment memos, semantic alignment rankings, next-best actions, trends, journeys, and more



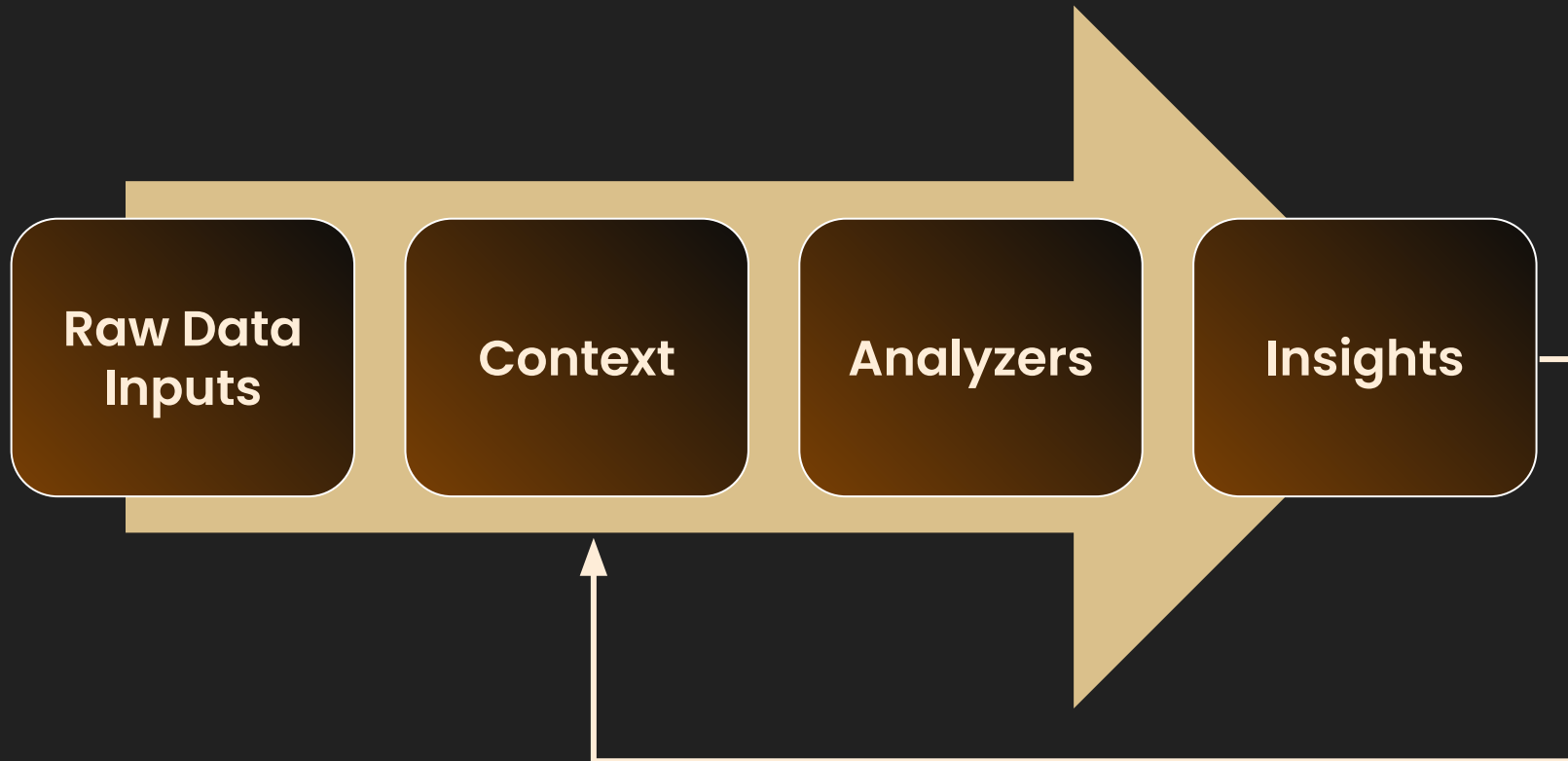
Structured & Unstructured

- Earnings calls, analyst transcripts, SEC filings, regulatory updates, press releases, trusted media
- Micro to macro view: a single enforcement filing to a whole portfolio or global economic trends

Structured Strategic Lenses

- Tailored to what matters most to investors
- SWOT, Gap Analysis, Red Flags, Green Flags, Analyst Pulse, Trajectory, Performance, Custom

How Weave.AI works



Your Use Cases & Weave's Capabilities: Illustrative Examples



Sectors
(Macroeconomic &
Sector-Specific
Trends)

"Which macro and sector indicators signal default or liquidity risk in private energy credit as nontraditional lending grows?"



Portfolios (Holistic View
Across Investments or
Assets)

"Which cross-asset correlations and macro signals indicate a need to rebalance our portfolio amid current market volatility?"



The Global Economy
(High-Level Macro
Trends & Systemic
Risks)

"How would a stagflation scenario affect the performance and correlation structure of our global multi-asset portfolio over the next 6-12 months?"



Single Local Document
(Focused Analysis of a
Specific Report)

"What are the key SWOT from Nvidia's Q1 earnings report—especially around AI demand, supply chain risks, and valuation—and how do they compare to analyst consensus and broader tech macro signals?"



Companies (Deep Dive
into a Single Entity)

"What recent signals indicate shifts in Tesla's credit risk and how does it compare to EV peers in financial strength and sentiment?"



Industries
(Sector-Level Analysis
for Strategic Planning)

"How is AI adoption reshaping competitive dynamics, efficiency and talent strategy across financial services firms, and which sub-sectors are moving faster?"