

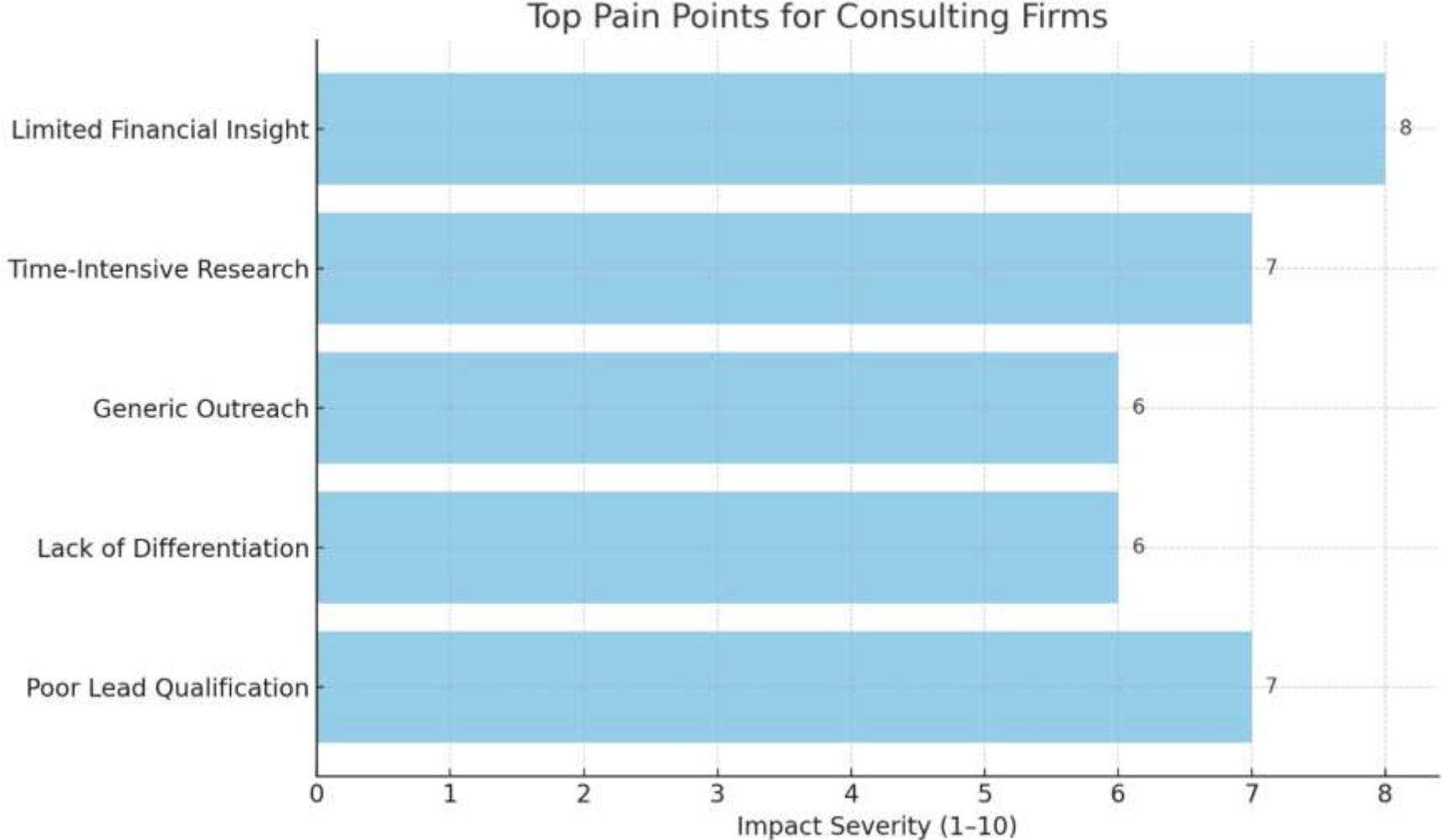


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**ICP 4:** Door-Opener for Customer Acquisition

**Beyond Scores. Causal Intelligence for Smarter Strategy**

# Pain Points for Consulting Firms



Source: Harvard Business Review, Deloitte Insights, McKinsey Reports, Clutch.co Surveys (2023–2024)



## Personalized Client Acquisition Through Financial Insights

**Use Case:** Our financial insights act as a powerful door-opener. If you're a consulting firm, you can leverage our causal analysis to identify a potential client's strengths and weaknesses in advance.

**Personalized Outreach Approach:** new clients with a tailored message that speaks directly to their financial pain points—demonstrating real value before the first meeting.

**Faster Customer Acquisition:** Stand out from competitors and start strategic conversations backed by data your prospects didn't expect you to know.



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# Our Innovative AI Technology



☒ **Explainable AI (XAI)**

⚖️ **Unbiased & Independent Ratings**

📊 **Causal Relationship Visualization**

🏢 **Industry-Specific Expert Systems**

📊 **AI-Driven Benchmarking**

🔒 **Data Security**



**Award Winning AI Technology**

## Solutions we offer:



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### Overview of Financial Services Offerings



**Note:** We also offer strengths and weaknesses analysis (SWOT) to help assess potential partners or competitors.

# What We Deliver



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**Note:** We analyze potential customers for you and provide a tailored SWOT analysis.

# Our Methodology



# (Top-rated companies)

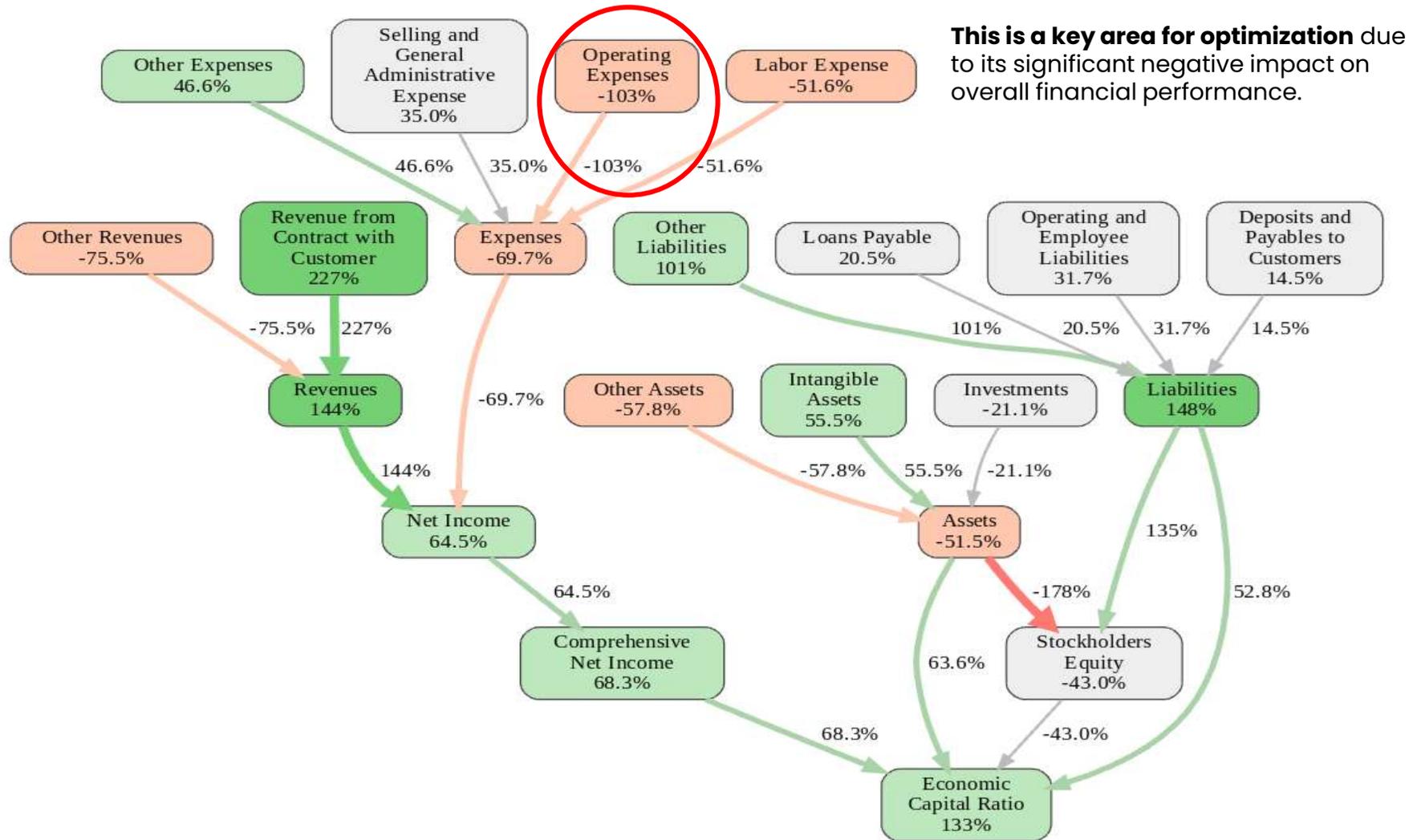
	RANK	COMPANY	SEAL	RATING VALUE	TREND	
	1	CNL Strategic Capital LLC		337.68%	0.0	
	2	Trilinc Global Impact Fund LLC		313.26%	0.0	
	3	U S Global Investors INC		295.56%	-2.0	
	4	Netcapital Inc		273.78%	-2.0	
	5	Marygold Companies Inc		263.12%	0.0	
	6	Diamond Hill Investment Group INC		247.71%	0.0	
	7	Assetmark Financial Holdings Inc		242.68%	-3.0	
	8	Brookfield Oaktree Holdings LLC		241.43%	0.0	
	9	Cohen Steers INC		235.76%	-6.0	
	10	Janus Henderson Group PLC		225.76%	-3.0	

- Helps you identify top performers in the industry.

# Example of AI-generated detailed financial analysis of a top-rated company



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Helps you gain transparent insights of a company's financial data

# Example of our Input & Output data to generate AI-driven financial analysis



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Input Variable	Value in 1000 USD
Assets, Current	0
Assets, Non-current	0
Cash	0
Goodwill	0
Inventory	0
Liabilities, Current	0
Liabilities, Non-Current	0
Notes and Loans Payable	0
Other Assets	6,601,757
Other Compr. Net Income	0
Other Expenses	364,502
Other Liabilities	2,237,032
Other Net Income	0
Other Revenues	9,518,202

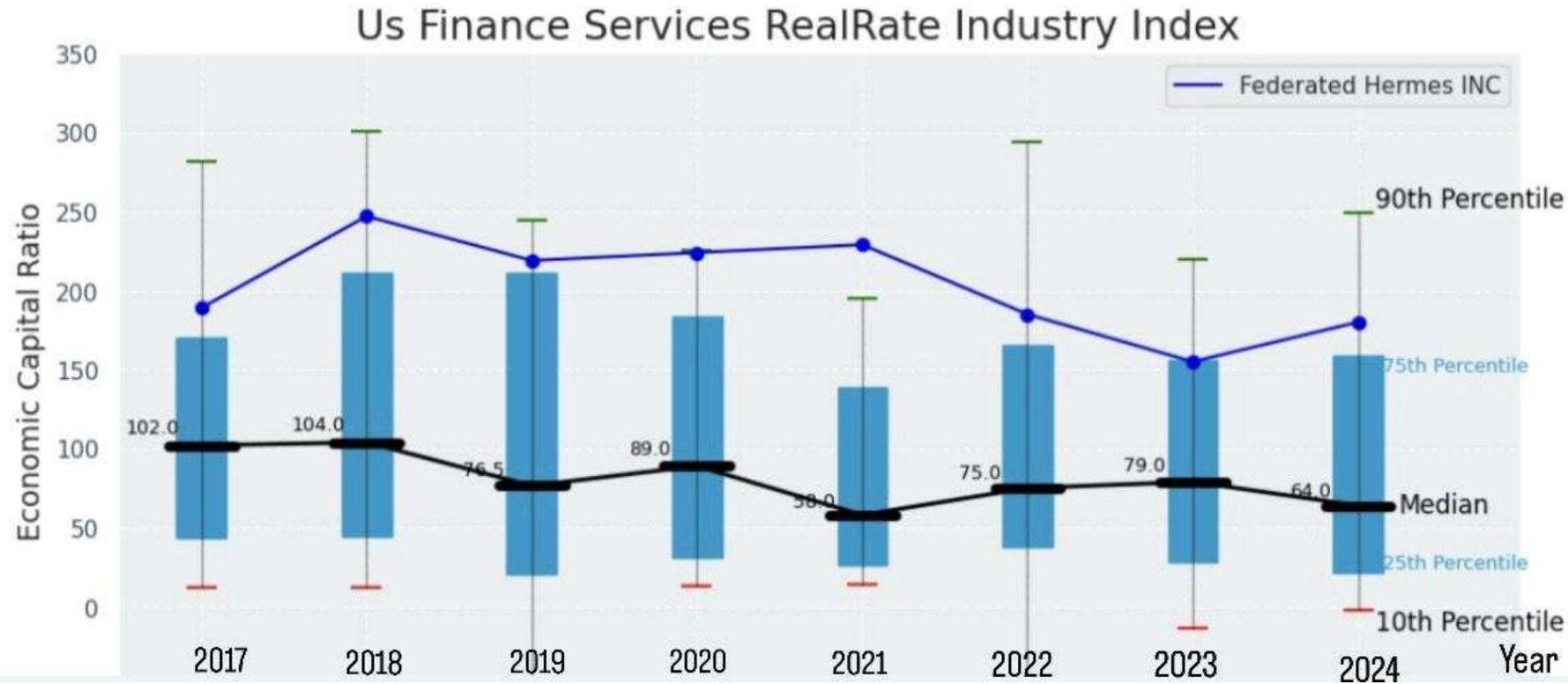
Output Variable	Value in 1000 USD
Liabilities	2,237,032
Assets	6,601,757
Expenses	364,502
Revenues	9,518,202
Stockholders Equity	4,364,725
Net Income	9,153,700
Comprehensive Net Income	9,153,700
Economic Capital Ratio	477%

- Use Input variables of financial data from the annual report.
- Generate Output Variables by using our award winning explainable AI.

# Changes in economic capital ratio overtime



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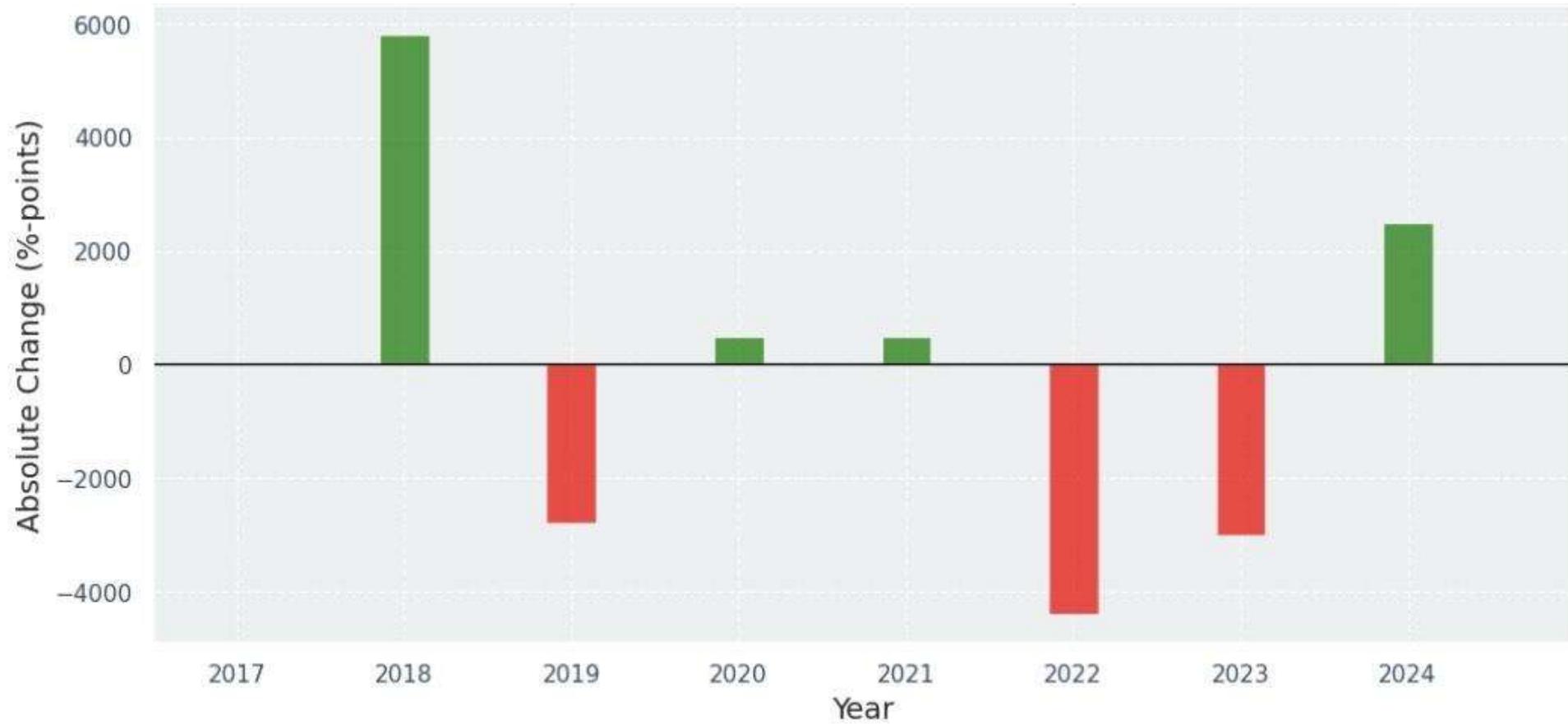


- Blue line: Company's Economic Capital Ratio vs. Industry Trend



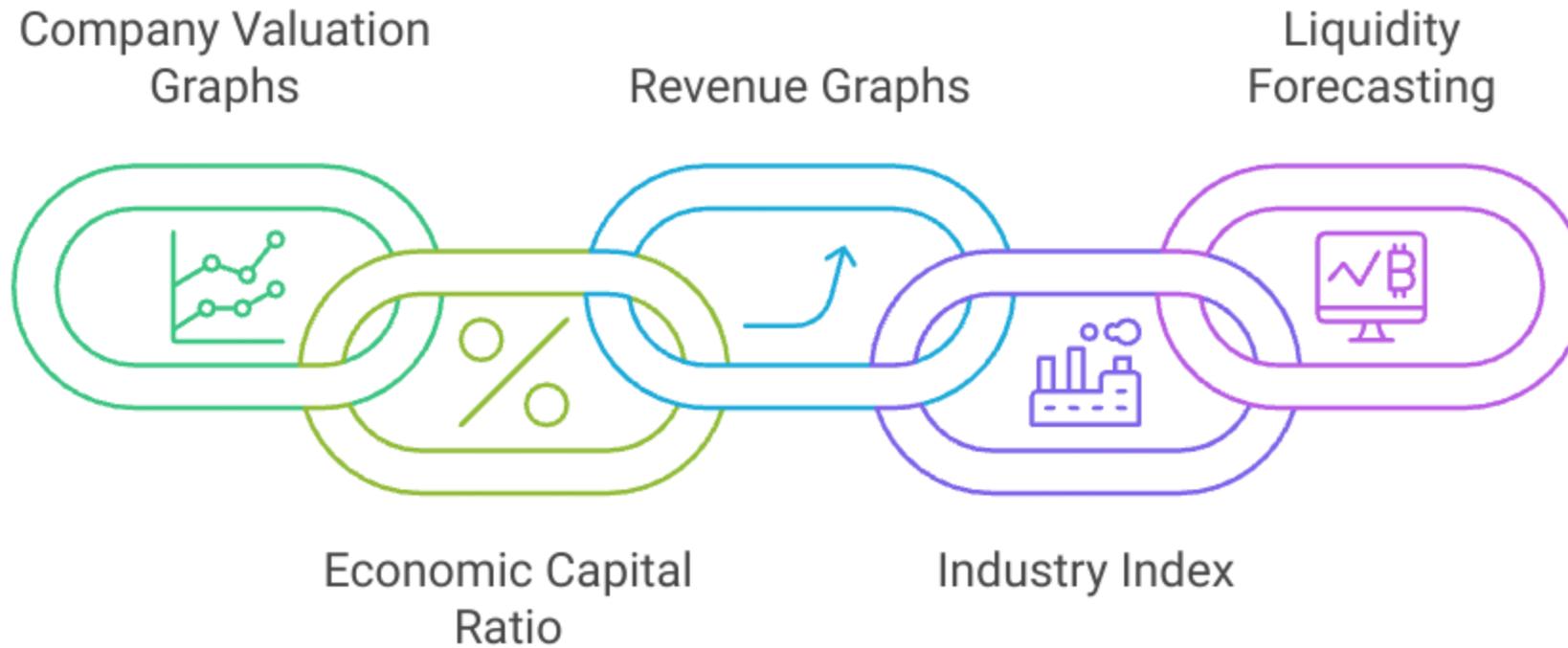
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## Changes in the company's financial strength



- Displays time-based performance insights

# Key Figures That Drive Decisions





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# Our financial ratings cover more than 20 industries

Total Company Ratings

13796

Total Industry Rankings

208

Top Rated Companies

3382

## US Health Services

- > 2023 US Health Services
- > 2022 US Health Services
- > 2021 US Health Services
- > 2020 US Health Services
- > 2019 US Health Services
- > 2018 US Health Services
- > 2017 US Health Services

## US Data Processing

- > 2023 US Data Processing
- > 2022 US Data Processing
- > 2021 US Data Processing
- > 2020 US Data Processing
- > 2019 US Data Processing
- > 2018 US Data Processing
- > 2017 US Data Processing

## US Software

- > 2023 US Software
- > 2022 US Software
- > 2021 US Software
- > 2020 US Software
- > 2019 US Software
- > 2018 US Software
- > 2017 US Software

## US Advertising

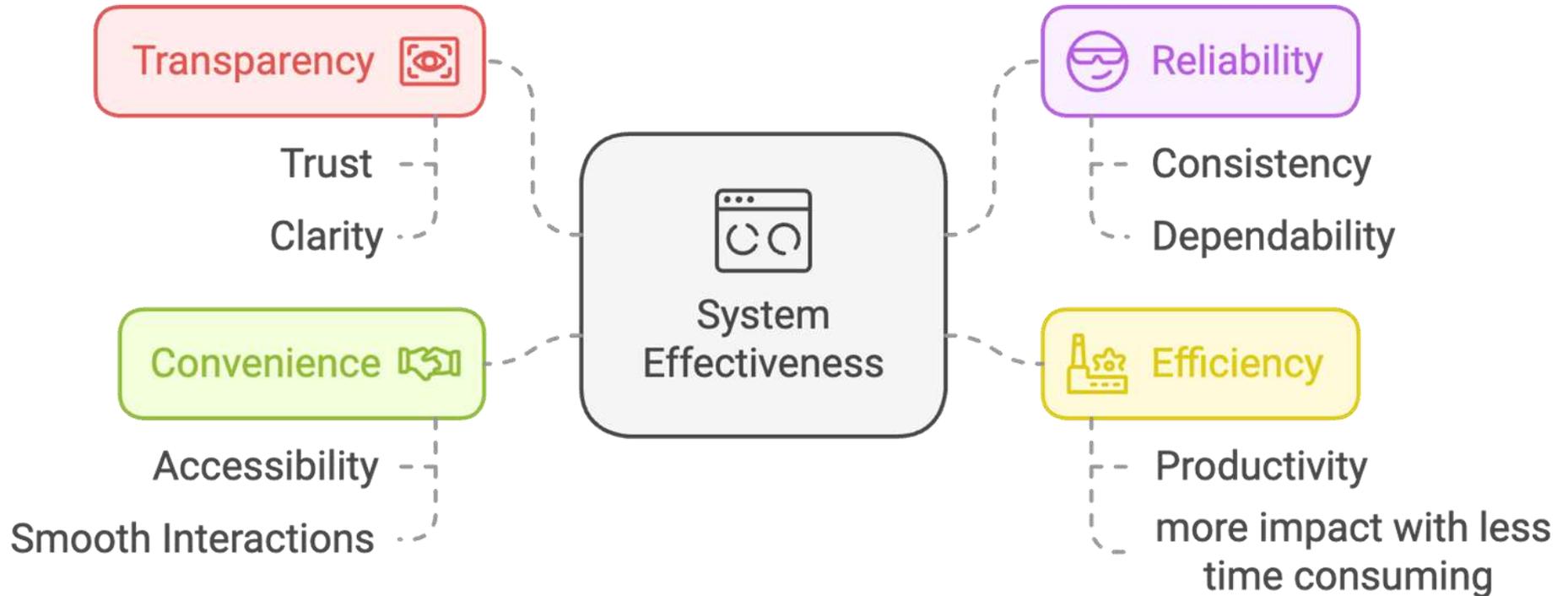
- > 2023 US Advertising
- > 2022 US Advertising
- > 2021 US Advertising
- > 2020 US Advertising
- > 2019 US Advertising
- > 2018 US Advertising
- > 2017 US Advertising



# Our Value Proposition



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# Our Success Story



## Joachim Zech

Marketing Director at Bayerische Vorsorge Lebensversicherung

*“The Real Rate seal on the financial strength of German life insurers is a valuable element in our customer communication. It is used on various channels, such as our website or on product presentations. As a neutral and scientifically based proof of our financial strength, the seal builds trust with our customers and partners.”*



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## **Contact**

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