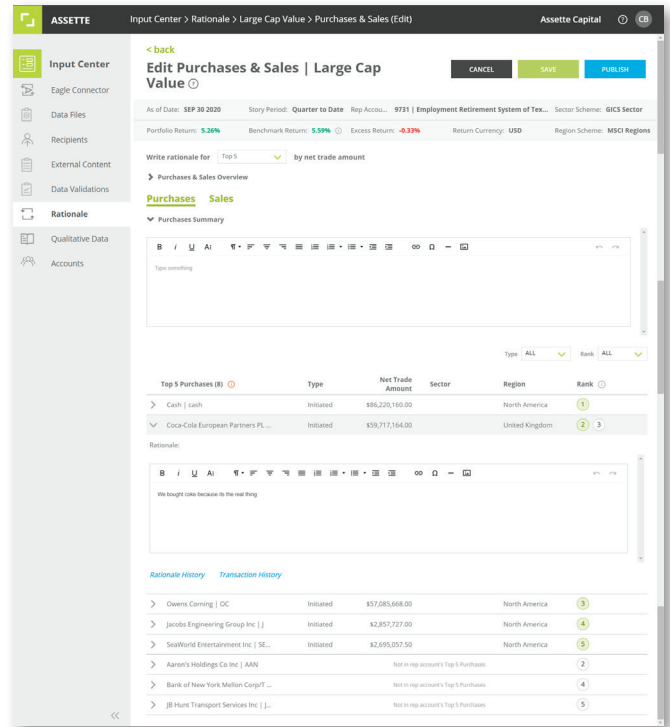# ASSETTE INVESTMENT COMMENTARY

Sharing the rationale behind investment decisions builds trust and transparency with clients. It is also a big part of staying ahead of competitors.

Your people and their expertise make your firm unique. With Assette Commentary, you can showcase their thinking and your long-term perspective on decisions affecting investment portfolios without spending tedious hours writing, editing, and reviewing commentary.

Assette automates the process of creating, editing, and delivering investment commentary. It uses AssetteGPT, the natural language generation AI engine purpose-built for asset managers, to narrate data stored in the same single, trusted source used for client report creation. AssetteGPT quickly and accurately generates account-specific commentary that explains performance and holdings in each portfolio.

HOW IT WORKS

Assette software automatically sifts through your attribution, performance and transactions data and stands up investment activity such as top contributors and detractors, top purchases, and sales. Our deviation analysis pinpoints securities deviating from the portfolios or model accounts that represent each strategy.

The software then prompts your investment writers to enter the rationale behind investment activity so your clients see how your decisions conform with your process and philosophy.

Next, an initial draft of the complete commentary is generated using AssetteGPT for optional editing by investment writers, analysts, and portfolio managers.

Once any updates are completed, the final commentary is generated for compliance review. It can be included in client reports, pitchbooks, and even your website.

The review process is tracked through the standard Assette workflow giving insight into delays.

ASSETTE

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