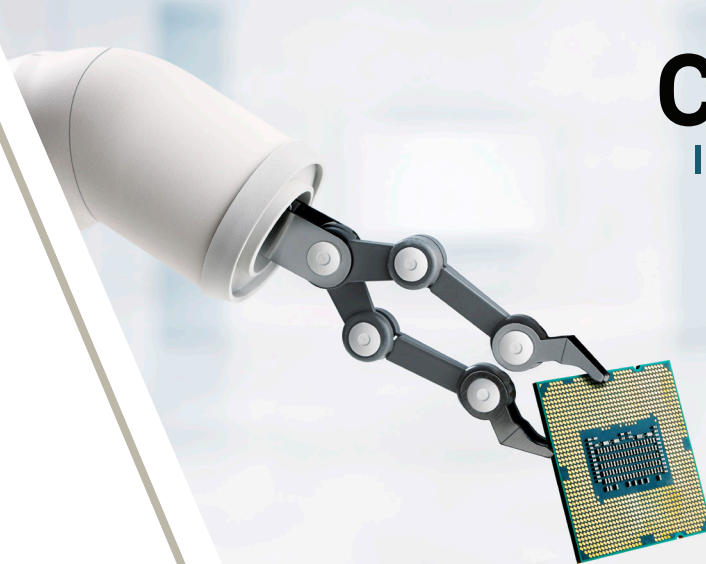


Case study

Automated in-house valuation process of L3 assets for a PE fund



Developed an end to end in house valuation solution for a mid-sized private equity fund combining scheduled valuation updates and insights into one integrated process, cutting valuation cycle time by 30% for 60 deals.

Objective



- A US-based private equity fund sought to reduce valuation cycle time by lowering processing time across the value chain
- Designed and integrated a multi-agent toolkit that embedded deep private-asset valuation expertise into hundreds of task-specific prompts, automating large parts of the valuation analysis and reports

Our solution



- Mapped key valuation inputs and assumptions from multiple data sources such as market data, capital activity and portfolio company data to roll models forward on time and process valuations for 60 deals
- Integrated multiple GenAI agents powered by large language models (LLMs) across key steps in the workflow, such as data extraction, model update and scenario analysis with all inputs and outputs guided and validated through structured human oversight
- Generated valuation commentary reflecting the latest changes, reviewed and approved by the in-house valuation team
- Produced a structured output for valuation committee discussions and finalizing the valuation report

Impact



- **Increased valuation frequency from quarterly to monthly** – The toolkit automates repetitive analytical tasks (data analysis, modelling, analytics, commentary), enabling monthly valuation updates
- **30% time saving** – Reduced valuation review time by ~30%, enabling valuation teams to increase valuation frequency and keep portfolio assessments more current
- **Expanded new deal coverage by 20%** – Ensured deeper and broader analysis, since time saved on manual work was redirected to scenario testing, cross-portfolio comparisons and driver-level insights
- **Efficient audit review** – The toolkit maintains a detailed log of changes to valuation assumptions, making third-party audit reviews easier to manage and substantiate, lowering the audit review process time by 20%-30%

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