

Case study

Scaling private markets research through AI-powered automation

Background



A US-based investment firm, focused on private equity investments, sought to enhance private markets research workflows through automation to improve sourcing coverage, diligence efficiency, and depth of company and sector analysis.

Challenge



- Manual, time-intensive workflows led to delays, inconsistencies, a higher risk of errors and scalability issues
- Limited bandwidth across investment and research teams to support increasing research needs
- Fragmented data across internal systems, external databases and public sources
- Lack of scalable analytics infrastructure for end-to-end automation, large datasets and real-time tracking

Our solution



Sourcing:

- Built workflows to source, clean and analyze government and third-party datasets to identify attractive market opportunities
- Automated monitoring of news, funding activity, customer wins and hiring trends to surface sourcing signals and deal leads

Initial screening/meeting preparation:

- Prepared AI- and FactSet-enabled company briefs, covering business profile, financials, management, ownership history, competitors and investors

Due diligence:

- Developed CIM comparison agents to identify changes in narrative, KPIs, risk language, positioning and investment case
- Summarized expert calls and public peer commentary into diligence-ready takeaways on market growth, competitive dynamics and risk implications

Portfolio monitoring:

- Built automated trackers to refresh KPIs, operating metrics and peer benchmarks, reducing manual work and improving portfolio review consistency
- Set up structured company and sector monitoring to flag material developments

Impact



90%+ effort savings

Through automation of manual research workflows

Expanded research scope

Through government databases, contract documents and 3P large datasets

Scalable solution

For complex research and analytics needs on an ongoing basis

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