



NEXUS AI

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The Problem

When the Fed raised rates last month, portfolio managers had 24 hours to explain the impact on 50+ portfolio companies. Portfolio managers struggle to connect macro events to company-level impacts in real time. Most tools either focus on quantitative metrics like price and volatility OR qualitative data like news and filings - but never integrated. This creates a critical blind spot: macro shocks move faster than humans can synthesize narratives into actionable insights.

Who Feels the Pain:

- Portfolio managers & analysts adjusting positions post-macro events (Fed announcements, oil shocks)
- Risk managers anticipating volatility from sentiment and policy shifts
- Investor relations teams producing data-backed narratives for LP communications

What if AI could bridge this gap in real time?

Introducing NEXUS

NEXUS is the AI co-pilot that translates macro narratives into quantitative portfolio decisions

Functionality

NEXUS fuses LLM narrative reasoning with quantitative modeling. It transforms unstructured data from earnings calls, filings, and news along with economic events (i.e. Fed releases) into predictive signals in real time. NEXUS generates three core outputs:

Predictive Narrative Factors

Earnings surprises, sentiment regime shifts

Interpretable Portfolio Narratives

Why we're positioned this way

Causal Macro-Micro Linkages

How events impact specific stocks

Key Differentiator: Not just signals—the story behind them.

Workflow

Use Case: Macro-Micro Linkage Discovery

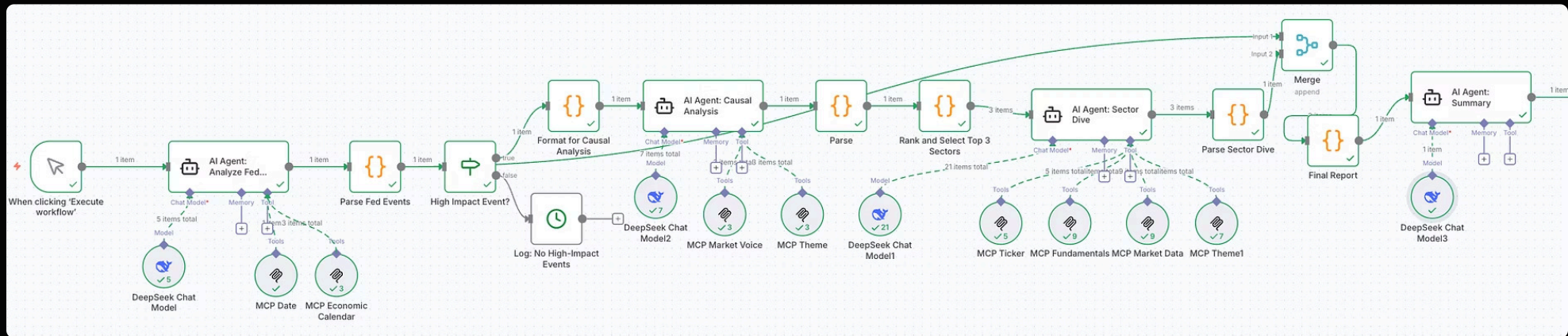
Scenario: Fed announces rate hike

NEXUS in Action (5-step workflow)

01	02	03
Detect	Reason	Quantify
NEXUS identifies Fed rate hike announcement	LLM traces causal chain: Rate hike → mortgage rates ↑ → housing demand ↓ → homebuilder earnings ↓	Model estimates timing (2-3 quarters) and magnitude (5-10% earnings impact)
04	05	
Generate Narrative	Action	
Auto-output: "Fed rate hike creates headwind for homebuilders. Our model predicts 6-8% earnings pressure in Q3. Recommend underweighting sector."	Portfolio manager adjusts allocation with confidence	

Demo

Google Docs
Nexus Demo.MOV



Impact & Differentiation

Value Creation

For Users



Speed

Complex macro events to actionable insights in real time



Performance

Potential for measurable alpha generation and significant tail-risk improvement



Communication

Clear, data-backed narratives for LP calls and decisions

Scale Potential

- **Horizontal:** Expand beyond equities to fixed income, commodities, FX
- **Integration:** API/SaaS model integrates with Bloomberg, FactSet, internal tools
- **Network Effects:** More users create richer narrative corpus and smarter models

Competitive Moat

- **Market gap:** Hedge funds build this internally—we're first to productize
- **Unique fusion:** Only platform combining narrative reasoning with quant modeling
- **Explainable AI focus:** Portfolio managers need the "why," not just the "what"

NEXUS doesn't replace portfolio managers—it amplifies their best thinking at machine speed.