

Leveraging Portfolio Monitoring Data with Agentic AI

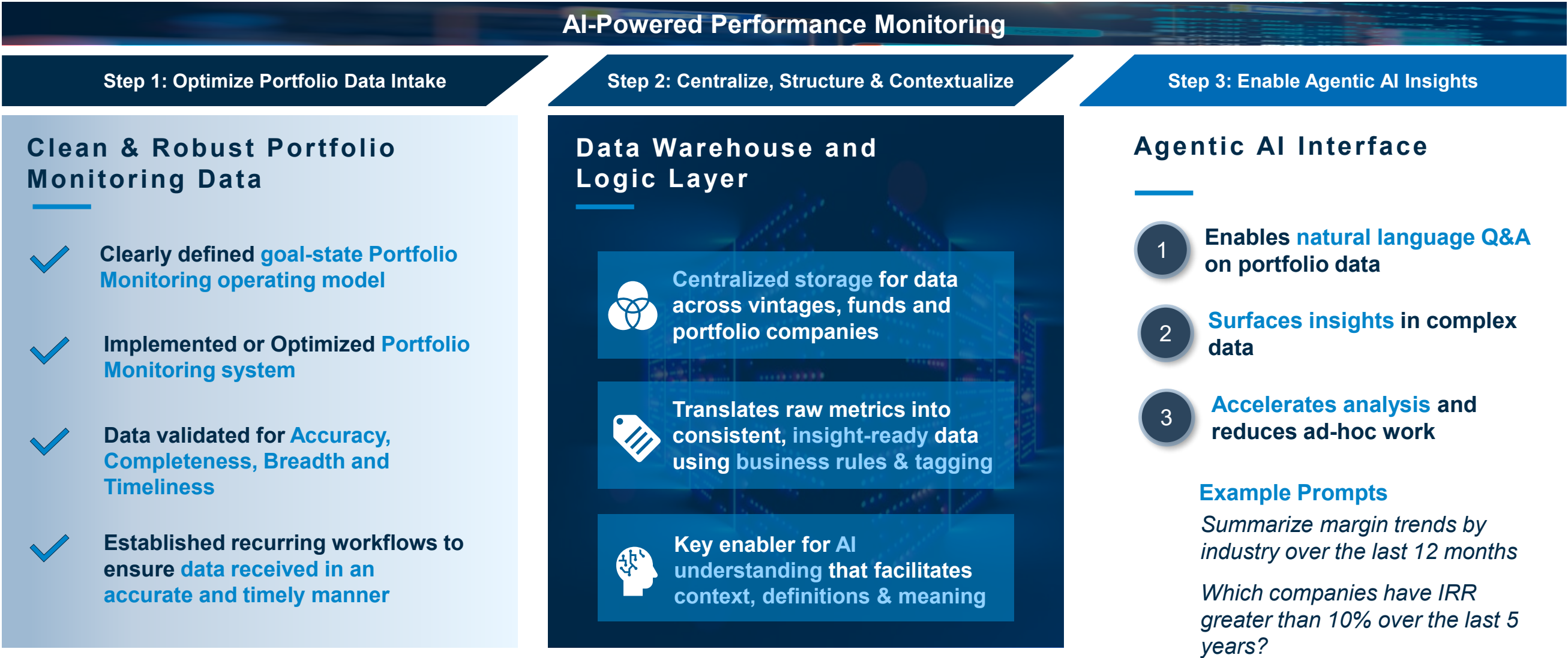
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ALVAREZ & MARSAL



How A&M Works with Private Equity Firms To Prepare Portfolio Data for AI Usage

Our Step-By-Step Framework To Build an AI-Ready Data Stack



Step 1: Optimize Portfolio Data Intake

A&M Ensures Your Portfolio Monitoring Data and Operating Model are Agentic AI-Ready Across Four Key Data Dimensions

The 4 Key Data Dimensions for Successful Agentic AI Deployment



Accuracy

Importance: Accurate data ensures precise, reliable outputs, building trust and enhancing user satisfaction

Bottom Line: Without accurate data, insights are meaningless



Completeness

Importance: Comprehensive datasets empower well-rounded, informed responses

Bottom Line: Incomplete data limits analysis accuracy & depth



Breadth

Importance: Diverse data and sets of metrics increases versatility and reduces bias

Bottom Line: Insights are constrained by the metrics provided



Timeliness

Importance: Up-to-date data maximizes relevance of responses leading to more impactful insights

Bottom Line: Stale data results in stale analysis

A&M Service Offerings

To ensure your Portfolio Monitoring data and operating model are Agentic AI-ready, A&M offers the below services:

1

Portfolio Monitoring System Selection & Implementation: Leverage our expertise to define your goal-state operating model, evaluate vendors, configure the system, migrate data and train internal stakeholders

2

Portfolio Monitoring System Optimization: Reinvigorate your current Portfolio Monitoring system and operating model by working with us to define your target operating model, configure the system, validate historical data, and design streamlined workflows

3

Platform Management: Utilize industry best practices to seamlessly take over workflows, configuration management, data validation and reporting to ensure timely and accurate data within your Portfolio Monitoring system

Step 2: Centralize, Structure & Contextualize Data

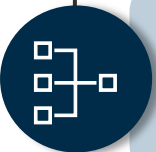
A&M’s Approach to Creating a Context Aware Data Warehouse for AI Integration

Semantic Information Capture For Agentic AI Enablement



Warehouse Infrastructure

Set up infrastructure with cloud native architecture for **centralized secure storage, governance** and AI integration



Data Model

Define a data model that **upholds business rules, facilitates insight generation** while encompassing **semantic layers** for AI understanding



Semantic Layer

Design and implement metadata capture to **communicate context & business rules to Agentic AI**



AI Enablement Data-Marts

Establish data marts for **improving accuracy and latency of Agentic AI application** often used data view and complex reports



Agentic AI Integration

Integrate with Agentic AI interface by enable **easy access to context for AI**

A&M Service Offerings

01

Product Strategy

End-User Focused Strategy Development for High Impact

02

Maturity Assessment

Identify gaps across infrastructure & operations early to de-risk and adapt

03

Solution Design & Product Roadmap

Inter-disciplinary design teams for integrating PE, AI and Technology expertise for highest impact

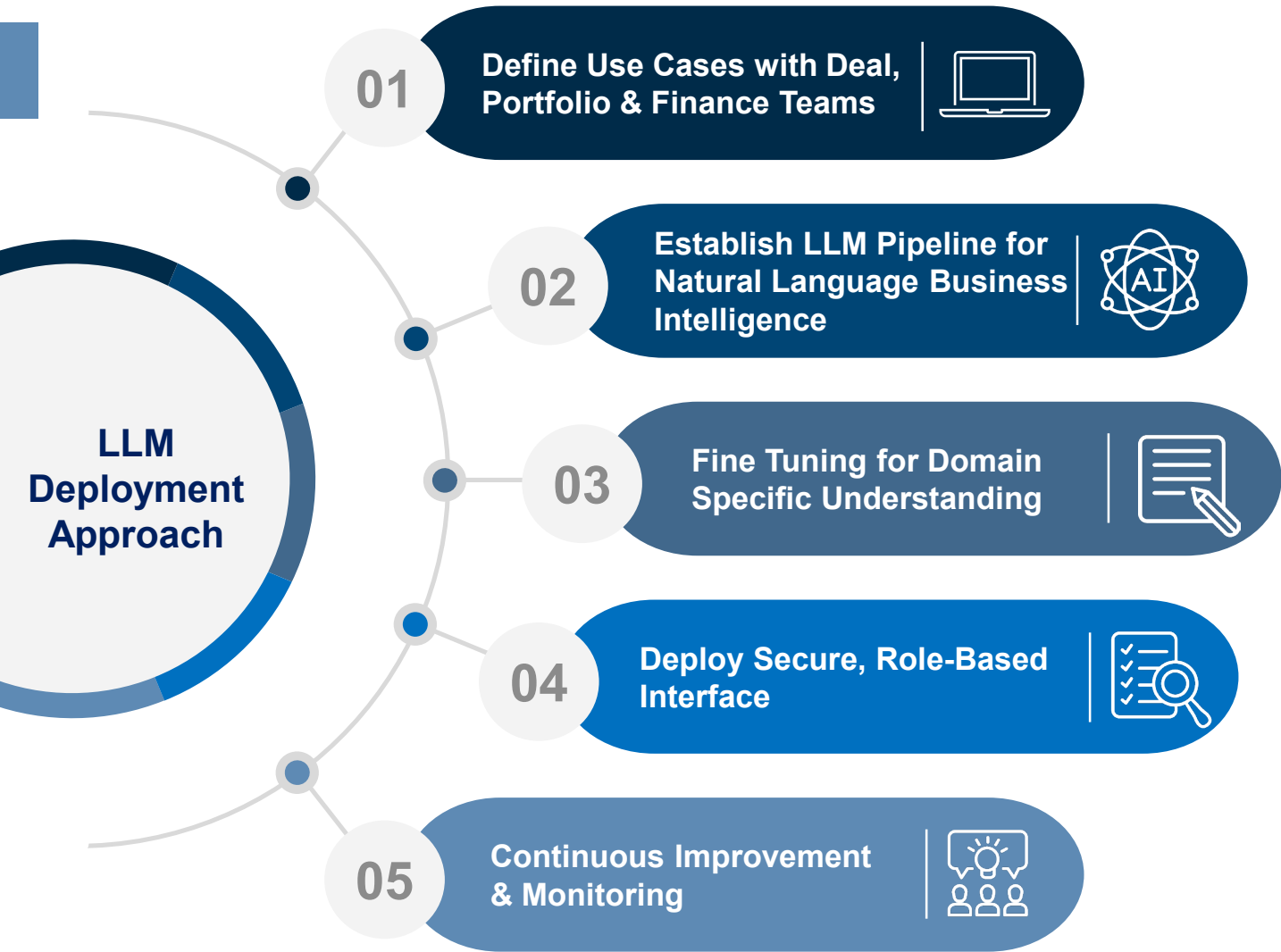
04


Implementation & Value Realization

Agile product management, governance and prioritization to ensure efficient delivery timely impact

Step 3: Enable Agentic AI Insights

A&M's Practical Framework to Build Secure, Purpose-Built LLM Solutions



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