

The AI Opportunity for Investment Analysis: How Oxford University Endowment Management (OUem) Leverages GenAI for Efficiency and Advantage

Generative AI (GenAI) has captured people's imaginations; businesses have been trying to understand how it can add genuine business value. It can be easy to fall into the trap of putting the AI cart before the horse, but ensuring value from these powerful new solutions means starting by asking what the business needs, and then understanding what is possible through this new technology.

Investment analysis has relied on the power of data, analytics and machine learning for years to augment human interpretation and judgement – GenAI has a similar role to play.

To demonstrate the potential of GenAI, let's examine an example of a bespoke, AI-powered solution we've recently developed for Oxford University Endowment Management (OUem). The solution consolidates unstructured investor reports and allows portfolio analysts to interact with the data in a natural and expedient way.

Making sense of unstructured data

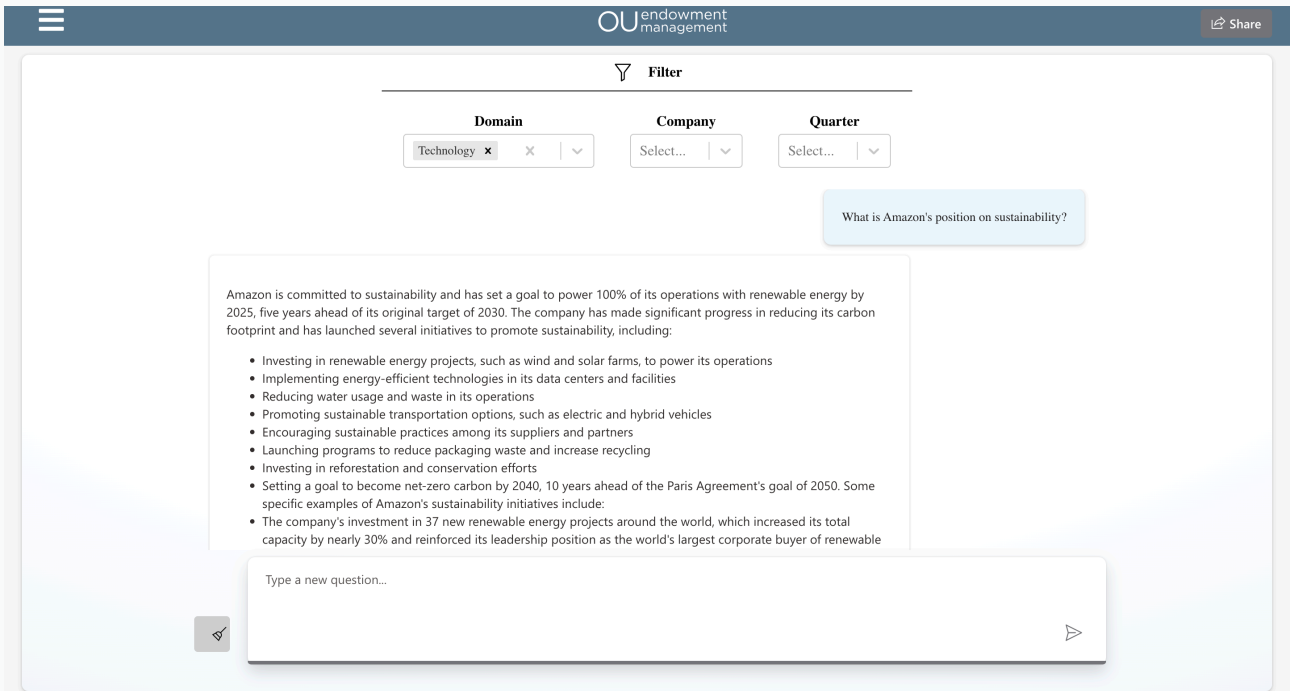
OUem exists to generate sustainable, long-term income from the University's endowment fund. The fund is worth approximately £6bn, 75% of which is invested in a range of distinct equity funds. OUem regularly reviews

the performance and perspectives of these funds to ensure its investments are appropriately allocated.

Each equity fund publishes a quarterly investment report rich in qualitative data on fund performance, growth prospects and risk profiles that contain valuable insights for OUem portfolio analysts. But these reports are also long, detailed and presented in different formats, making it slow and laborious to sift through them for meaningful or actionable insights.

AI-powered insights

One of GenAI's strengths is the ability to effectively consolidate unstructured data by reading it and giving users the ability to recall specific information. By starting with a clear understanding of OUem's needs, we can leverage this power to make it easier and faster for analysts to find what they are looking for in these quarterly investor reports.



IQR leverages proprietary investor reports. For the purposes of demonstration, this image uses publicly available data.

Thorogood has built a solution with OUem that consolidates these reports for easy access and adds AI powered insights to aid in analysing them. It's called IQR – the Indexing and Querying Quarterly Reports solution.

At the heart of the IQR solution is a GenAI chat interface. This allows analysts to interact with it in a natural, conversational mode, generating summary responses based on the data from reports, with citations to specific documents so that analysts can check the accuracy of the responses. Users can also filter responses by quarter or by fund manager or conduct semantic searches to find the information they need even without exact keyword matches.

See a public demo version of the IQR solution in action [here](#).

Innovation that delivers business outcomes

We collaborated closely with OUem during development and the IQR solution is now being tested in daily operations. We will be monitoring everything from user feedback to consumption data to ensure the core purpose is met and delivers value for money.



Find out more:

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We are now at the point that GenAI can transform operations for businesses, providing solutions are developed in the right way. If you want to integrate this technology into your operations, start by understanding where the opportunities lie and what AI can do to help you leverage them.

If you would like to explore how generative AI can unlock new opportunities for your business, our team is ready to help.