Investment Agent
Simplifying Financial Decisions

Investment Agent is Covasant's **AI-powered, agentic research engine** that reduces investment research cycle time by **40–50%**, automates data gathering, and delivers alpha-generating insights in real time. Built on **Microsoft Azure**, it ensures enterprise-grade **security, scalability**, and **compliance**.

By streamlining analyst workflows and accelerating decision-making, firms gain faster deal execution, stronger governance, and improved portfolio performance.

To extend this impact across the investment lifecycle, Covasant also offers a suite of **adjacent agents** that complement the Investment Agent:

Geo Expansion Agent
Pinpoints and prioritizes high-potential markets using signal and theme-based analysis.

Financial Model Reviewer Agent
Flags errors and risks in financial models to ensure accuracy and reduce exposure.

KPI Tracker Agent
Monitors and standardizes portfolio KPIs with real-time reporting and alerting.

LP Update Agent
Automates investor updates with templated performance reports and audit-ready logs.

How Investment Agent Accelerates Smarter, Faster Investing

Accelerated Research
Cuts investment research prep time in half (12 hrs → 6 hrs), enabling **40% more deals evaluated per quarter.**

Real-Time Insights
Monitors market news, filings, and alternative data streams to flag risks instantly.

Automated Compliance
AI-driven audit logs and rule checks cut compliance costs by **20–30%**, reducing regulatory exposure.

Proven ROI
Drives **$10M–15M incremental revenue** from faster deal execution and alpha generation.

Analyst Experience
Reduces low-value work, improves retention by **10%**, and prevents costly knowledge drain.

Enterprise-Grade SaaS
Runs securely in client's **Azure VNet** with **SOC 2 / ISO 27001** posture

Business Impact

KPI	Baseline	12-Month Target
Analyst research time per pack	12 hours	6 hours (↓ 50%)
Deals evaluated / quarter	25	35 (↑ 40%)
Annual compliance spend	$5M	$4M (↓ 20%)
Analyst retention	76%	86% (↑ 10 pts)
Incremental revenue	--	$10M – $15M

Target Industries

Private Equity   Hedge Funds   Investment Banks   Asset Management   Mutual Funds

Powered by Microsoft Azure

Data & Ingestion
Service Bus   Data Factory   Blob Storage

AI/ML
Machine Learning (LLMs + Embeddings)   LangChain   LangChain-style orchestration on Azure Container Instances

Application Layer
Functions   Load Balancer   Container Apps

Analytics
Synapse Analytics   Cosmos DB   AI Search

Security & Compliance
Azure AD   RBAC   Purview   Monitor   Customer-Managed Keys (CMK)

Want Finance to Become Your Growth Engine?

Schedule a Demo