

equipped

ANALYTICAL INTELLIGENCE

MASTERING YOUR DATA

2023



Most Innovative Technology

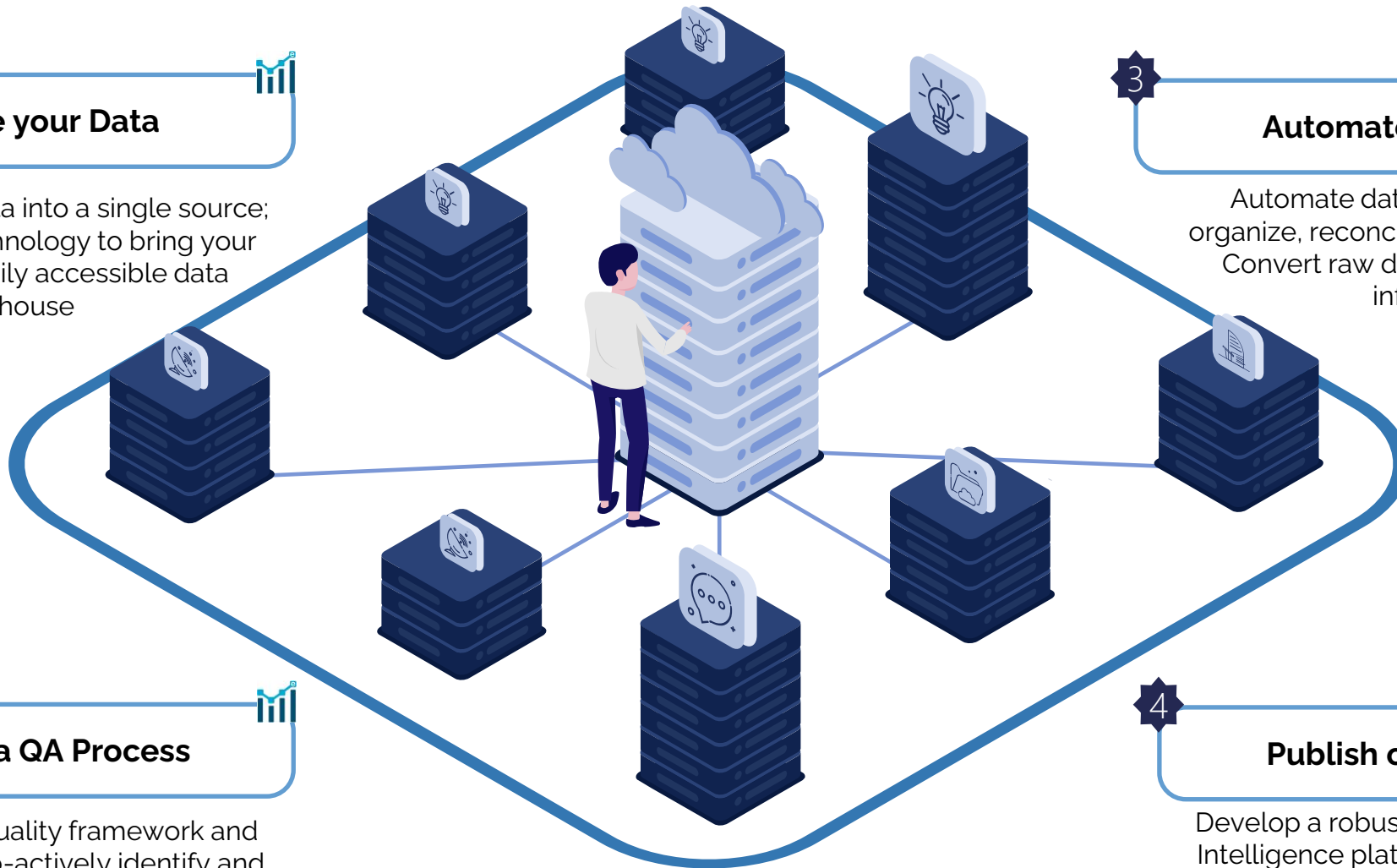


Equipped AI: Four Fundamental Steps of Progress

1

Centralize your Data

Consolidate your data into a single source; leverage cloud technology to bring your assets into an easily accessible data warehouse



3

Automate Workflows

Automate data processes to clean, organize, reconcile, and standardize data. Convert raw data into rich, accurate information

2

Implement a QA Process

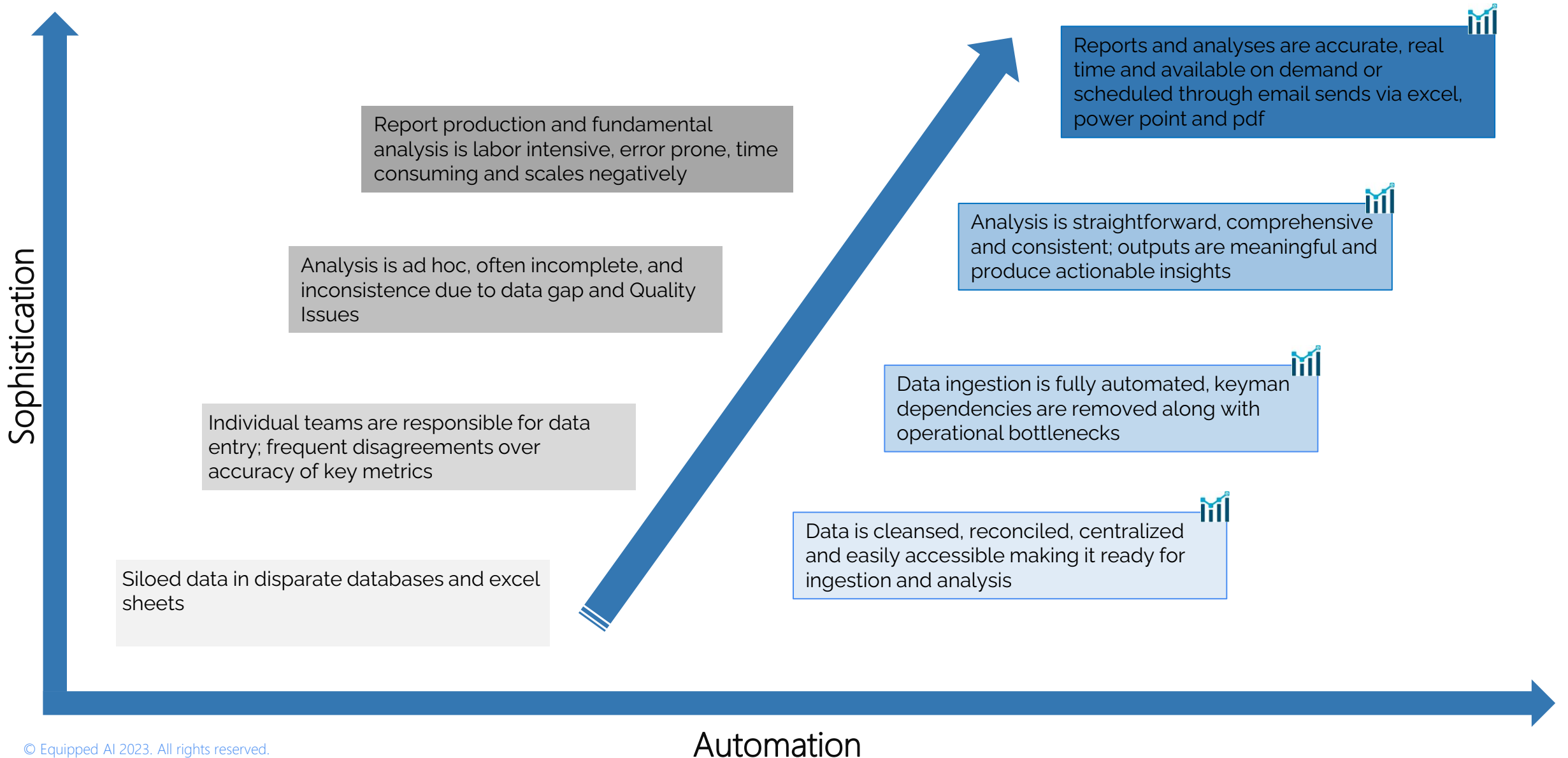
Implement a data quality framework and business rules to pro-actively identify and resolve data quality issues

4

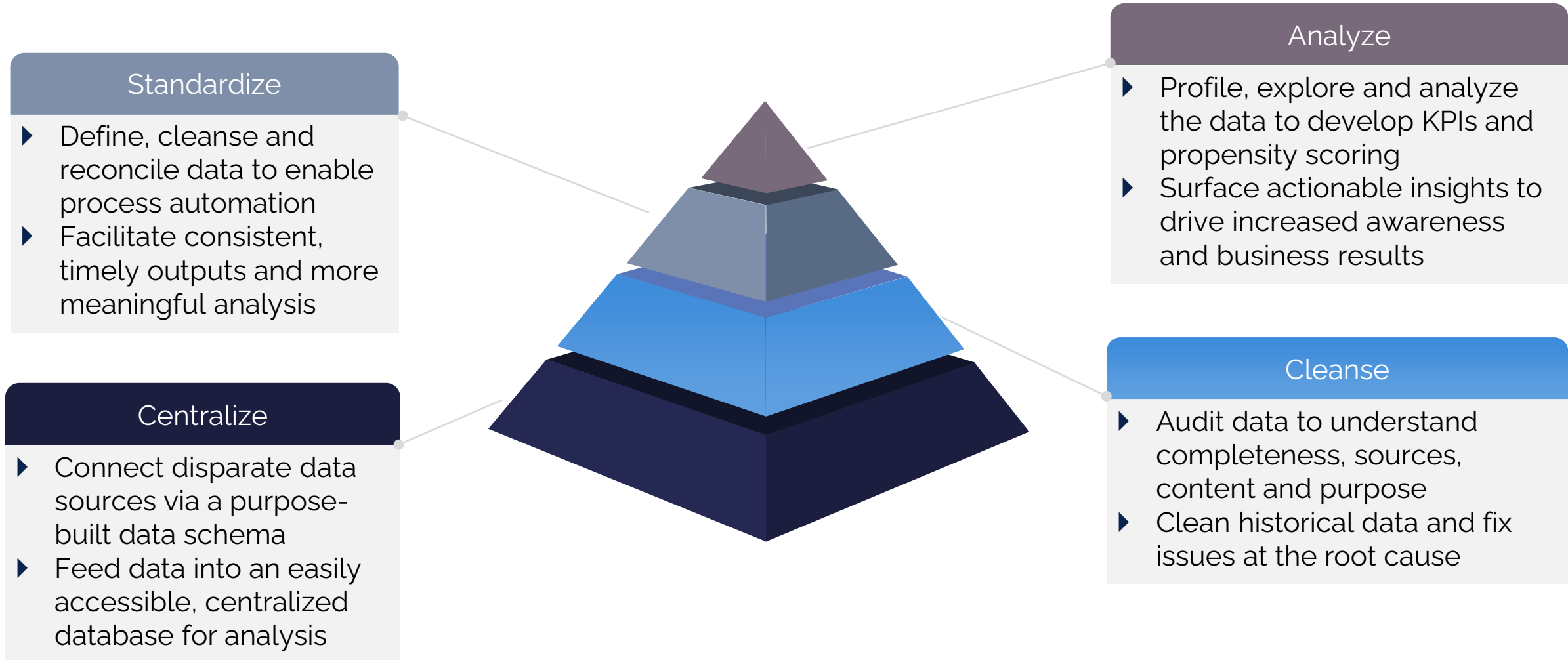
Publish on a BI Platform

Develop a robust and scalable Business Intelligence platform that automatically generates and distributes reports and analysis

Equipped AI: Breathing Life In Data



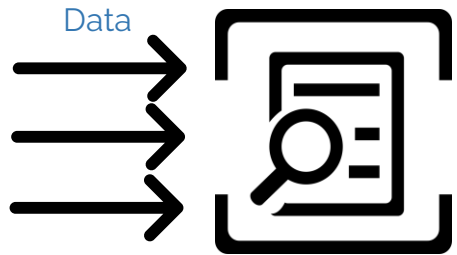
Centralize: Data Consolidation, Bottom Up



Automate: Data Management at Scale

Seamlessly integrate disparate data sources and automatically pull data and upload files into the system without human intervention

Ingestion



Transformation

Convert raw data inputs to rich, clean, accurate outputs that can easily leveraged by reporting and analytical teams.



Calculation

Derive, track and report on key performance indicators, critical business metrics and propensity scores in real time



Publication

Generate insightful, visually stunning reports and analyses on demand or on schedule and automatically distribute to relevant stakeholders.

Implement: A Quality Assurance Framework

Rule Based Testing

Create a rigorous rule-based testing regime that quickly identifies not only erroneous data but also inconsistencies in business logic

Machine Learning

Use machine learning algorithms and scoring techniques to identify outliers and material shifts in the structure and quality of data over time

Data Remediation

Identify root causes of bugs and irregularities and trace them back to data owners for permanent resolution.

Monitor Data Quality Metrics

Methodically quantify and report on data quality issues to get buy-in from business leaders and assess the impact of operational changes



First line of Defense

Interrogate data at ingestion to immediately identify gaps, errors and issues that can be rectified at the time of entry to avoid time consuming post facto reconciliation

Scoring Mechanism

Implement rigorous data scoring to create thresholds for monitoring, while also identifying outliers and deviations too subtle to be caught by rule-based testing alone

Issue Management

Approach issue identification and remediation systematically to ensure problems are resolved at root, once and for all.

Stakeholder Management

Continuously measure data quality at all business levels and report to senior management to reinforce accountability and ownership

Publish: A Robust, Scalable BI Platform

Your Data Anywhere, Anytime

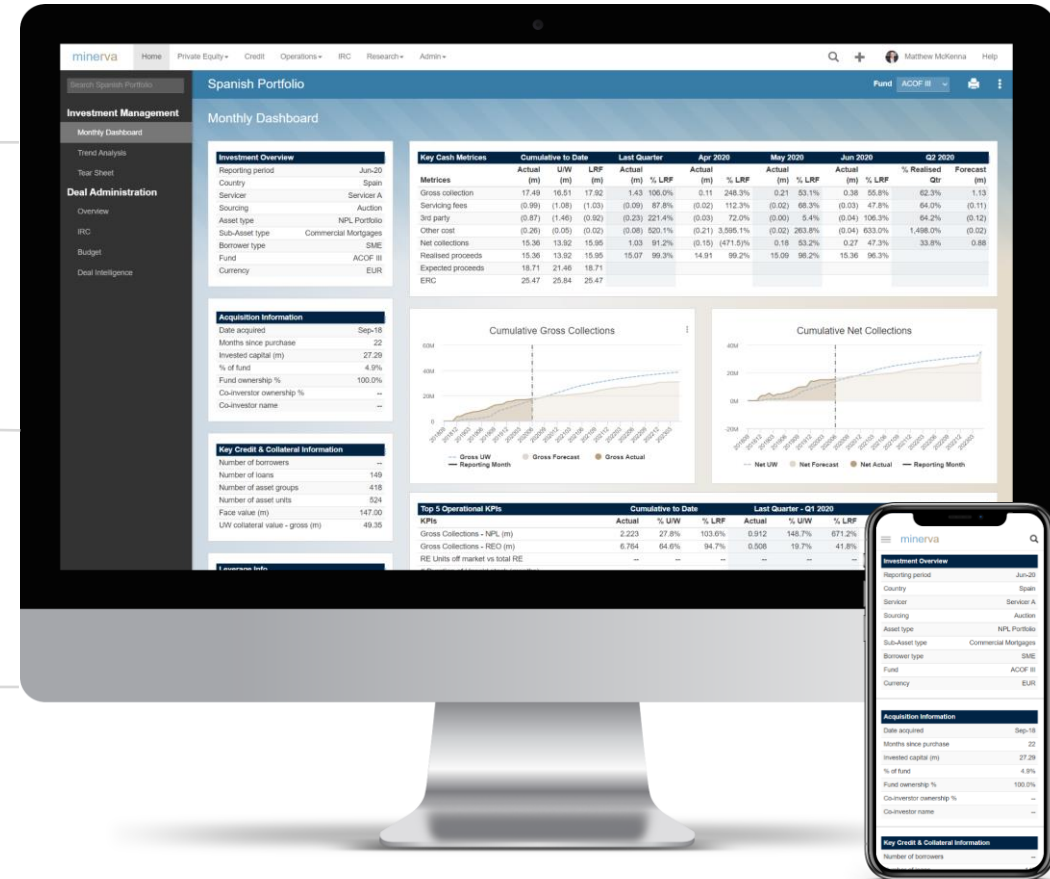
Leverage cloud-based SaaS services - like [Equipped AI's Minerva](#) - to surface key information, operational intelligence and insights for real-time decision making

A Golden Data Source, Automated

Establish a single source of truth across the organization to enable consistent analysis, action-orientated operational intelligence, investment monitoring and reporting

Robust, Fit for Purpose & Scalable

Ensure automated and error-free data ingestion, cleansing and QA processes to provide not only interactive dashboards but also rich metrics ready to be processed by embedded reporting and analytics processes



Case Study

Granular Credit End-to-End Data and Business Intelligence Platform

The Client

- European granular credit investor
- €3bn invested across 4 funds
- 85+ investments across 10+ European countries

The Challenge

- To build a robust scalable BI Platform
- Process granular data from multiple, disparate sources
- Produce accurate investment returns and analysis in a timely manner

The Approach

- Build a centralized database
- Automation to ingest, cleanse, standardize and reconcile data and derive KPIs
- Streamline reporting, interactive dashboards and embedded analytics

The Solution

- A centralized intelligence platform built on a foundation of intelligent, automated data processing
- Interactive intuitive dashboarding and report generation

Results



Mastery of Data

- Data is fully captured, converted from raw data feeds into a standardized 'Golden' source
- Data quality issues are identified and resolved in a timely manner
- Data flows are automated



Focus on Value Add Activities

- Manual intervention has been minimised
- Key man dependencies removed
- Personnel are free to focus on deal origination and asset management activities



Scalable Growth

- New investments and funds can be added to the system in a standardized way
- Headcount no longer grows with assets growth
- Clean, accurate data is available for in-depth analysis and reporting

Case Study

Granular Credit End – End Data and Business Intelligence Platform

The Client

- An American investor active in Spanish non-performing mortgage market
- €4bn in loans under management across a dozen portfolios

The Challenge

- Poor quality and inconsistent data feeds were impacting the firm's ability to track and monitor collection strategies, update forecasts and get a clear understanding of operational bottlenecks

The Approach

- Performing a full data audit, assessing data quality, accuracy and consistency over time
- Developing a QA framework to resolve and manage reporting and data issues

The Solution

- Implementation of a full end-to-end data quality framework, rule-based assessments and scoring mechanism to quickly identify outliers and opportunities
- Clear, concise management processes to solve problems at the root cause

Results



Improved Data Quality

- Identifying common data quality issues required only minor operational changes while vastly improved data quality
- Tracking and monitoring issues promoted ownership, accountability and significantly improved data awareness and engagement



Accurate Monitoring

- Clean, accurate and timely data allowed for more detailed strategy monitoring
- Insight and trends analyses facilitated the identification and correction of performance deviations.
- Cost management enabled accurate ROI measurement on investments



Unique Operational Intelligence

- Clear data insights on performance facilitated the development of new decision-making tools and value-added collection strategies
- The development of a test-and-learn framework helped optimize performance and ROI.

About Us

Formed in 2017, **Equipped AI** is a global analytical intelligence and software company that works with leading private equity, private credit and real estate investors.

We combine **data science** and **technology** to provide actionable insights into our clients' portfolios. Our state-of-the-art SaaS intelligence platform, Minerva, enables investors to collect, compile, analyse and better understand data to help them make important decisions and ultimately produce superior returns.



2017

EQUIPPED AI ESTABLISHED TO SUPPORT ANACAP FINANCIAL PARTNERS' INTERNAL PE AND CREDIT FUNDS

2019

TEAM GROWS TO MORE THAN 30 STAFF, PROVIDING FULL-SERVICE RESEARCH AND ANALYTICS

2020

EQUIPPED SPLITS OUT FROM ANACAP TO FORM WHOLLY INDEPENDENT BUSINESS AND TO SUPPORT EXTERNAL CREDIT, PE AND REAL ESATE INVESTORS ACROSS EUROPE

2021

TOTAL FACE VALUE OF ASSETS TRACKED EXCEEDS €21bn; HEADCOUNT SURPASSES 50 STAFF.

2022

EQUIPPED SYSTEMS TRACKING MORE THAN 75,000 CLIENT ASSETS ACROSS 20+ COUNTRIES; HEADCOUNT SURPASSES 100 STAFF.

Team | High calibre & experienced

Integrated London and India Analytics, Data, Product and Business Intelligence units



Edward Green
CEO

Ed is responsible for Equipped's overall strategic direction. Prior to joining Equipped, Ed was a Partner at AnaCap FP, most recently as head of the firm's European Credit Platform. Previous to that role, Ed spent ten years as part of AnaCap's PE value creation team. Ed played a crucial role in developing the Minerva software technology platform as well as building out Equipped's managed services solution. He is a CFA Charterholder with over 18 years of investment and operational experience.



Atul Arora
Managing Director

Atul crystallized the concept of Equipped as a standalone technology solutions business for the alternative investment industry. After joining the team in 2019, Atul leveraged two decades of experience to coherently define and integrate Equipped's software and services into Equipped's enterprise-grade platform offering. He is an alumnus of BITS (Pilani) and ISB (Hyderabad).



Douglas Trafelet
Business Development Director

Douglas heads Equipped's business development efforts. He has more than 20 years of sales and marketing experience in the financial services industry. Douglas has opened offices, gone to market and built commercial and research teams in Europe, the US and Asia. His previous roles within private markets include leadership positions at firms including PitchBook, Moonfare, Dealroom and Coleman Research Group.



Stephen Connolly
Managing Director

Stephen oversees Equipped's analytics and machine learning activities, with a keen focus on leveraging data to provide deep insights and operational intelligence. Stephen has over 15 years' experience in financial services, solving complex data, modelling and financial analysis problems across a wide variety of sectors.



Matthew McKenna
Head of Minerva

Matthew is responsible for Equipped's software development and is the original creator of Minerva; building on years of R&D and experience at AnaCap Financial Partners. He has 15 years of Business Intelligence, Software Development and Product Management experience.



Praveen Kumar
Manager, Data Operations

Equipped's technical deliver manger with more than 15 years experience, including roles with Barclays, Cognizant and DXC Technology.

Equipped AI team focused on delivering standardized, scalable and automated services

THANK YOU!

Contact: Douglas Trafelet

Email: sales@equipped.ai

Phone: +44 204 551 5676 / +1 646 586 9934