

Insights Generator: Your AI Assistant for Portfolio Analytics & Reporting

Imagine asking your portfolio a question and getting charts, tables, and insights instantly without hunting through dashboards or reports. That's **Insights Generator**, our Agentic AI capability embedded in **73 Monitor**. It's your AI assistant for fast, context-aware analytics that accelerates smarter decisions.

Why This Changes Everything for Your Portfolio

Turn questions into confident decisions:

Get immediate, decision-ready insights without waiting on analysts or building reports, enabling faster, better informed decisions.

Insight you can act on:

Teams can explore, refine, and drill deeper without resetting context, turning questions into understanding, not one-off answers.

Confident decisions, built on the right data:

Rapid insight delivery helps teams spot risks early, validate performance quickly, and respond decisively to change.

Built-in trust and compliance:

Every insight is explainable, auditable, and governed by enforceable rules, reducing risk while delivering intelligence quickly.

What if your portfolio could talk? Now it does.



Your portfolio explained instantly:

Get clear answers generated by an AI agent that understands your data.



Insights that cut through the noise:

AI agent surfaces what matters, highlighting risks as they emerge.



See beyond the numbers:

See what's driving performance, and where risk is building.



Follow the insight. Not the Workflow:

Drill deeper, ask follow-ups and evolve analysis without starting over.



Every insight. Fully accountable:

Trace every answer back to its source data for audit-ready, defensible decisions.

What Makes Insights Generator Unique



Embedded AI Workflow

Outputs integrate directly into dashboards, documents, and reports.



Iterative Exploration

Drill deeper into insights through follow-up questions.



Domain Expertise Built-In

Interprets complex, ambiguous questions accurately every time.



Visual and Narrative Intelligence

Delivers charts, tables, and explanations in a single view and ready to share.

Use Cases in Action

Private Equity

- What is the current valuation of each portfolio company relative to its entry valuation?
- Which investments are outperforming or underperforming expectations?
- What are the revenue growth rates and EBITDA trajectories across the portfolio?
- How much dry powder (undeployed capital) remains in the fund?

Private Credit

- What is the current credit health of each borrower across the portfolio?
- Flag loans at risk of covenant breaches or payment defaults.
- What is the current yield and total return of the portfolio?
- What is the current portfolio composition by vintage, industry, loan type, and seniority?

Venture Capital

- What's the current cash runway for each company, and which ones are at risk of running out of capital soon?
- How are companies tracking their revenue targets and growth projections?
- What are the burn rates, and are they accelerating or improving?
- Which companies are approaching profitability or achieving positive unit economics?

Infrastructure

- Monitor operational KPIs across multiple assets, such as uptime, capacity utilization, and cost performance.
- Evaluate capital expenditure vs. expected ROI for projects across regions.
- Identify underperforming assets and generate narrative explanations highlighting inefficiencies or maintenance issues.
- Produce portfolio-wide dashboards with comparative performance metrics, risk assessments, and regulatory compliance summaries.

Ask. Analyze. Act.
Insights on demand.

Book a demo →

