



# Accelerating Growth in the AI Era

Distribution Strategy | Investor Engagement | AUM Expansion

# The Quantitative Investing Landscape & Panagora's Edge

## MARKET DYNAMICS

- » \$2T+ in systematic AUM globally—quant now mainstream
- » Shift from 'big data' to 'smart data' with demonstrable alpha
- » ESG integration table stakes, but quality data scarce
- » Risk Parity gaining traction: 60/40 portfolios carry 93% equity risk
- » AI reshaping both investment process AND distribution expectations

## PANAGORA DIFFERENTIATORS

- » Proprietary data creation: biotech FDA models, NLP sentiment, Chinese social scraping
- » 'Discovery & Dollars' philosophy—human-machine synthesis
- » Integrated research + portfolio management teams
- » Risk Parity leadership: 0.87 vs 0.67 Sharpe (vs 60/40)
- » ESG innovation: greenwashing detection via NLP, materiality focus

# AI-Era Distribution: Intelligent Lead Management & Engagement

*Created for Discussion with Tim Stanton*

## 1 Predictive Lead Scoring

- » ML models on CRM data: score by conversion probability & AUM potential
- » External signals: job changes, RFP activity, regulatory filings, conference attendance
- » Real-time alerts on buying intent: website visits, content downloads
- » Prioritize sales time on highest-value opportunities

## 2

## Hyper-Personalized Outreach

- » AI-drafted communications tailored to portfolio gaps & interests
- » Dynamic content: Risk Parity to consultants, ESG to pensions
- » Adaptive nurture sequences based on engagement patterns
- » Scale personalization without scaling headcount

## 3

## Intelligent Meeting Prep

- » AI briefing docs: holdings, recent allocations, stated concerns
- » Competitive positioning summaries before every pitch
- » Conversation guides highlighting relevant Panagora strengths
- » Post-meeting auto-generated follow-up recommendations

# Generating Buzz: Thought Leadership & Publicity for Modern Investors

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## 1 AI-Powered Content Engine

- » Research → white papers → podcasts → social threads → video clips
- » Real-time market commentary: AI draft + human polish = speed + quality
- » Interactive 'Risk Parity Portfolio Builder' for prospects
- » 'Smart Data, Smart Alpha' thought leadership series

## 2 Strategic Amplification

- » LinkedIn optimization: timing, hashtags, engagement triggers
- » Earned media: pitch 'Why 60/40 is dead' angles to financial press
- » Podcast circuit: CIO shows with Eric's 'pilot + quant' narrative
- » Update & amplify Institutional Investor Risk Parity research

## 3 Community & Events

- » Virtual 'Quant Masterclass' series—exclusive, invite-only
- » AI-powered post-event follow-up within 24 hours
- » Target ICP: diversification seekers, pension CIOs
- » Build long-term relationships, not just transactions