

Section 1

Executive Presentation

Company Experience

- The company has over 15 years of experience in analyzing listed co
- It effectively leverages a network of mentors and professionals wi
- This extensive experience supports the company's focus on early-st
- While not a traditional investment bank, the company's adeptness i

Section 2

Work Culture

- The work environment is dynamic and hands-on, encouraging active engagement with practical projects from the start.
- Employees receive direct support from experienced consultants who assist in overcoming challenges.
- The development environment is equipped with advanced AI tools, providing opportunities to work with state-of-the-art technology.
- There is a strong emphasis on real-life application through projects and integration platforms, allowing employees to see the tangible impact of their work.
- The culture promotes individualized sessions and group workshops to explore the potential of generative and agentic AI, ranging from administrative automation to more complex challenges.
- The overall focus is on achieving results, continuous learning, building long-term partnerships, and fostering innovation in a stimulating, tech-driven environment.

Section 3

AI Project Roadmap

1. 0–6 Months – "As Oportunidades Mais Fáceis":

- Automate administrative tasks such as compliance, risk, and reporting.
- Target quick wins by simplifying and streamlining routine processes.

2. 6–18 Months – "Evolução da Experiência do Cliente":

- Enhance customer experience with AI-powered advisory agents for real-time assistance.
- Introduce natural language interfaces for customer interaction with portfolios and instant insights.

3. 18+ Months – "Core IA":

- Transition to autonomous monitoring where AI systems manage compliance and risk.
- Embed AI deeply into core operations for continual, intelligent oversight.
- This phased approach builds confidence with simpler use cases before moving to complex applications.
- Emphasis on practical, hands-on learning through projects, consultant support, and full development environments, exemplified in the AI Studio program.

