



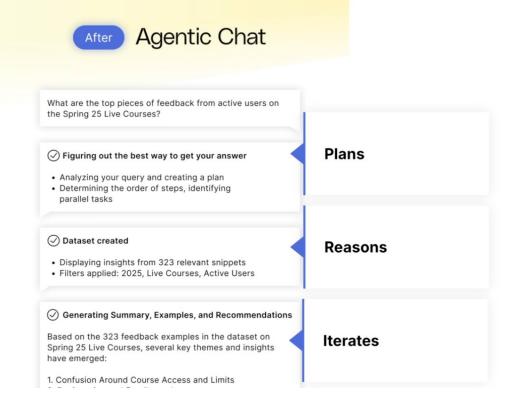
Before Generative Chat

What are the top pieces of feedback from active users on the Spring 25 Live Courses?

I've filtered the datasets for the most relevant data.

The feedback on the new Live Courses reveals a mix of positive experiences and areas for improvement. Users expressed appreciation for the live courses, highlighting their value in providing real-time interaction and engagement with experts.

Click here to see the themes and associated feedback.



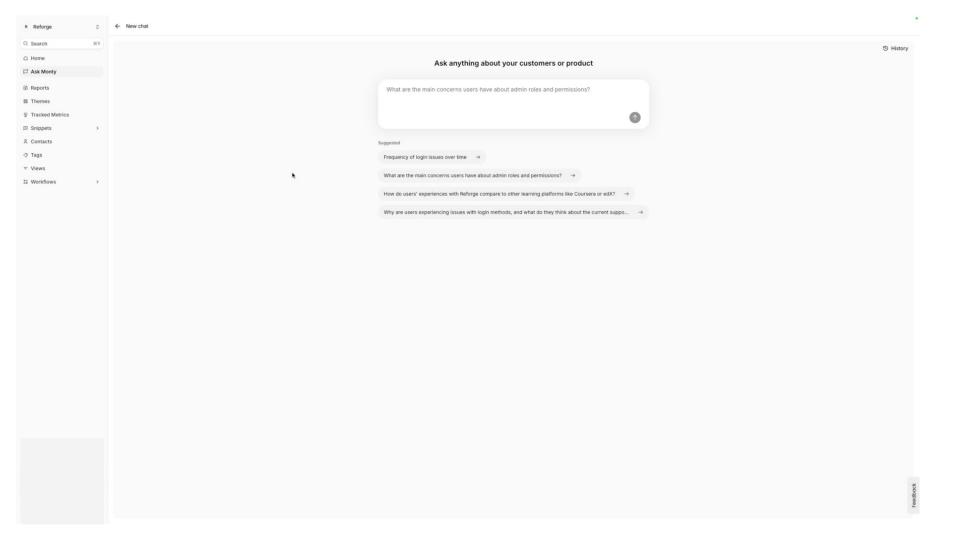
## Four New Capabilities w/ Agentic Chat

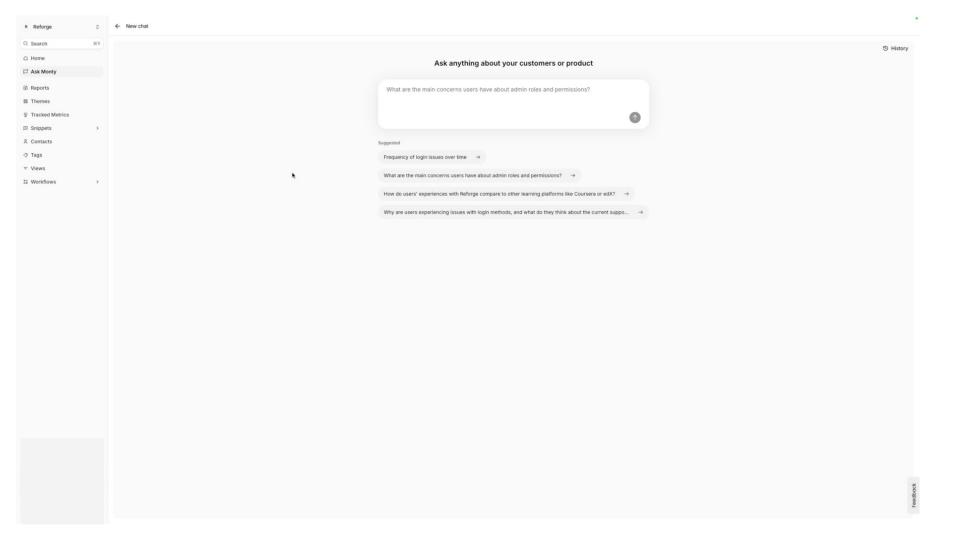
**Instant Answers To Multi-Dimensional Questions** 

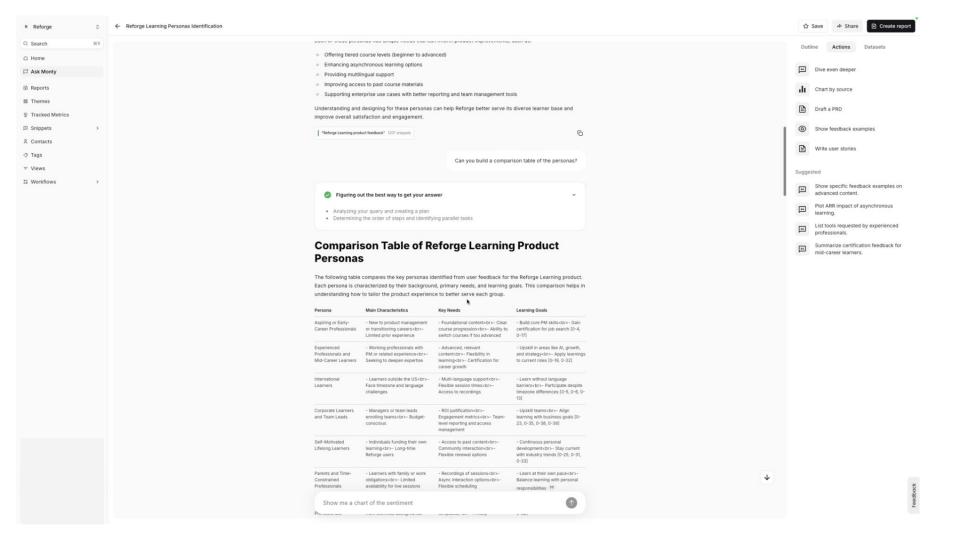
Explore, Segment, Compare, and Visualize All In One Conversation

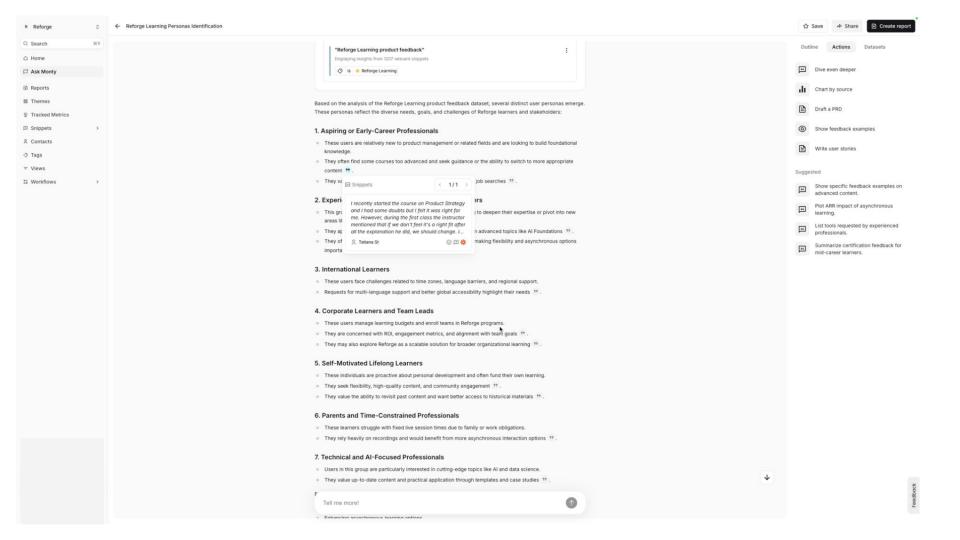
Your Company Context is Built In

nip The Work: Draft the Artifacts You Need









## Thought for 1m 5s

Query: "I'm meeting the CFO of a public SaaS company (ServiceNow) next week. Can you help me prep with banker-grade insights — including financial context, investor pressure, product GTM gaps, and opportunities to create value?"

- To support the banker, I need to generate insights across four key layers: financial performance, capital
  markets posture, operational GTM signals, and strategic value unlocks. This involves parsing public filings
  (10-Qs, earnings transcripts), CRM relationship data, analyst research, and buy-side sentiment.
- First, I'll extract financial metrics and trends from the last two earnings calls. I'll focus on revenue quality (subscription vs. services), RPO growth, margins, and guidance deltas. I'll flag any misses (e.g., GenAl monetization laq) and recurring risks.

I'll use sources like SEC EDGAR, BAMSEC, and Sentieo to pull verified earnings highlights and analyst summaries.

 Second, I'll assess investor posture. I'll scan for major shareholder movements (+/-), activist positioning (13D, news), and valuation narrative shifts from recent sell-side notes. I'll look for dissonance between management tone and investor expectations.

Morningstar, WhaleWisdom, and CaplQ will provide stake data. I'll use quote parsing to extract fundspecific angles (e.q., "delayed GenAl payback").

- Third, I'll layer in go-to-market insight from product launch timelines, usage data (if available), and CRM insights: churn patterns, underused features, and whitespace in key verticals. I'll pull in internal bank deal exposure to surface where we've added value or been underexposed.
- Finally, I'll synthesize 2-3 "bankable" narratives to frame the conversation:
- · Restructure AI monetization via product carveout or JV
- · Expand partner-led GTM in slower verticals with financing overlays
- · Consider segment reporting changes to isolate high-multiple units
- I'll cite at least 10 high-signal sources, blend public and internal CRM data, and use structured reasoning to turn a "Q&A ask" into a banker-grade thought partner experience — fully citing rationale and surfacing actionable next steps.

## Thought for 1m 1s ∨

12 searches • 12 sources M net worth but faces partial property ownership and needs to support a child. They're considering relocating to a country with solid healthcare and education.

I need to gather relevant data, including cost of living, healthcare quality, education costs, residency options (like golden visas), and property markets. Some candidate countries include Portugal, Spain, UAE, Singapore, Canada, Costa Rica, and New Zealand. Portugal's healthcare and schools may offer benefits but language could be a barrier. I'll focus on finding options with good public services and residency options.

- To help with the user's plans, I need to break things down into clear sections. First, I'll outline their financial situation, net worth breakdown, and cash flow. Then, I'll calculate a sustainable withdrawal rate using models like the Trinity Study. The housing strategy will involve renting their Oakville house and possibly selling their condo. I'll explore potential country options, along with cost-of-living, healthcare, education, residency requirements, and tax optimization. I'll gather the necessary citations through web searches to back up the plan.
- Searched the web

Q. Portugal D7 visa passive income requirement 2025 Q. Safe withdrawal rate 2024 Morningstar study

10 more

Global Citizen Solutions Morningstar Numbeo 42 9 more

- I need to search for data on Oakville's rental yields and average rents for a three-bedroom in 2025. I'll also look into the market for selling Toronto condos in 2025, gathering at least 10 reliable sources. Some search results are from news, which could be useful, so I'll check a few for confirmation. I'll also review safe withdrawal rate research to back up the financial plan and include citations throughout the response for factual reliability.
- Searched the web



- To craft a comprehensive financial plan, I need to gather information on the rental yield in
  Oakville and the current condo market in Toronto. I'll target at least 12 high-quality sources,
  including news articles, and make sure to open and confirm key details. I also need to find
  details on the safe withdrawal rate and cite at least 10 reliable sources. Once this is gathered, I'll
  put everything together into a summary and detailed sections to fully outline the plan for the
  user.
- I'm considering various strategies for liquid assets. I could sell the Toronto condo to free up
  capital or rent out the Oakville home for \$4k/month, with property management. I'd maintain
  \$1.4M in securities, investing in diversified portfolios with a safe withdrawal rate (3.5-3.7%). This
  could generate around \$122k-165k CAD/year plus rental income of \$40k.

When evaluating relocation options, Portugal, Spain, and Costa Rica offer appealing residency programs with good healthcare and education. However, taxes and residency requirements must be considered for each. A structure involving low-fee ETFs and non-resident tax strategies looks promising as well.