| **Slide Type** | **Mentioned By** | **Industry Focus** | **Slide Type Nature** | **Slide Objective** | **Current Pain Points** | **AI Augmentation Opportunities** | **Data Inputs / Sources** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Market Overview Slides** | Jason T, Will R, Jael Ortiz | Industrials, Energy, Defense | Stock | Set market context, show trends | Manual updates, tracking new charts | Auto-generate charts from FactSet, suggest narrative from macro sources | FactSet, Bloomberg, RBC research |
| **Public Information Book (PIB)** | Jason T | Industrials | Stock | Provide full company background | Time-consuming to collate | Auto-compile and reformat public filings & earnings calls | SEDAR, EDGAR, CapIQ |
| **Company Profile / Comparable Slides** | Will R, Jason T, Elana Bittker | Energy, Industrials, Consumer | Stock | Benchmark against peers | Updating comps, consistency in layout | Auto-pull peer comps and pre-format tables | FactSet, Bloomberg |
| **Executive Summary** | Will R, Jason Neumann | Energy, M&A Generalist | Bespoke | Persuade, frame the pitch | MD-led, highly iterative, slow feedback | Drafting support from meeting notes/transcripts, refine with tone guidance | Analyst notes, MD commentary |
| **Trading Updates / Share Price Slides** | Jason T, Will R | Industrials, Energy | Stock | Update on market sentiment | Chart formatting, stale data | Auto-refresh visuals + annotations from real-time market feed | Bloomberg, FactSet |
| **Annotated P&L / Financials** | Nick Garmulewicz | Tech (Fintech/SaaS) | Bespoke | Explain financial logic, walk through assumptions | Manually built, high scrutiny from senior stakeholders | Add annotations from earnings commentary or forecasts | Excel, CapIQ, Transcripts |
| **Intro Meeting Slides** | Mikayla, Jael Ortiz | Tech, GovTech | Stock | Introduce RBC team and credentials | Tombstone selection, formatting | Auto-pick tombstones based on client sector | RBC deal database, CRM |
| **Defense/Industry Trend Charts** | Jael Ortiz | Defense, Gov | Mixed | Persuade with macro/policy shifts | Manually created, inconsistent formats | Suggest visualizations from news/trends | Gov docs, Bloomberg, FactSet |
| **Budget History Slides** | Jael Ortiz | Gov / Defense | Mixed | Link historical policy to industry outcomes | Data segmentation by political cycles | Auto-build chart timelines; color-coded by party/period | Government budget data, internal models |
| **Quad Pages** | Will R | Energy | Stock | Compare KPIs visually across peers | Complex layout, chart duplication | Auto-generate 4-panel visuals from comp set | FactSet, internal models |
| **Exchange Ratio Slides** | Will R | Energy | Stock | M&A math — show transaction logic | Data sensitivity, formatting | Structured template fill + verification tool | Internal models, CapIQ |
| **Fireside Chat Decks** | Mikayla | Tech (SaaS) | Stock | Prompt informal investor conversation | Streamlining narrative | Auto-generate based on call notes or press release | Notes, investor Q&A |
| **Teasers and SIMs** | Mikayla | Tech (M&A) | Mixed | Attract buyer interest or explain asset in detail | Content tailoring, SIM bloat | Suggest boilerplate + tag content based on buyer type | Company info, private data rooms |
| **Bespoke Strategic Slides** | Davis English, Will R | Energy | Bespoke | Make nuanced argument, show positioning | High effort to craft narrative + layout | Suggest structure from past decks, provide example phrasing | Peer decks, internal models, analyst notes |
| **Visual Bullet Slides** | Jael Ortiz | Defense | Bespoke | Drive home a point clearly | High polish needed, DTP involved | Copy refinement + layout suggestions | Internal notes |
| **Team Slides** | Mikayla, Jason T | Tech, Industrials | Stock | Showcase banker bios + coverage | Keeping bios current, visual alignment | Pull bios from internal CRM, auto-format | CRM, LinkedIn, internal profile docs |