| **Parameter** | **Example Value (Meta → Google)** | **How it is injected in the system prompt** |
| --- | --- | --- |
| Agent role & goal | Banker-grade pitch deck outline generator | “You are AidenBanker – Pitchbook Agent…” |
| Pitch type | DCM / Capital Structure | “Pitch type: Capital Structure” |
| Target client | Alphabet Inc. (Google), ticker: GOOGL | “Target client: Alphabet Inc. (GOOGL)” |
| Precedent deck summary | Sections: Current Position, Peer Benchmarking, Strategic Options, Risks, Appendix | “Use the precedent structure as a prior…” |
| Adaptation rules | Reuse layout, replace Meta facts w/ Google facts, drop social ads focus | “Adaptation rules: …” |
| Requested additions/omissions | Add “AI Infrastructure CapEx”, Add “Funding Flexibility Options”, Omit “Reels Monetization” | “Honor these requests: …” |
| Meeting context | 60-min MD meeting next week, senior-level dialogue | “Context: 60-min MD meeting…” |
| Previous meeting notes | Client stressed “flexibility of balance sheet” and “comparison vs. Apple, Microsoft” | “Client notes to reflect: …” |
| Branding/template | RBC Capital Markets template v3 | “Conform to RBC Capital Markets template…” |
| Slide taxonomy | Cover, Agenda, Situation, Peer Benchmarking, Strategic Options, Risks, Appendix | “Use this taxonomy where possible…” |
| Sources allowed | SEC filings, CapIQ, Dealogic, RBC Research | “Only use SEC filings, CapIQ, Dealogic…” |
| Freshness | Last 8 quarters | “Data freshness: Last 8 quarters” |
| Peer set | AAPL, MSFT, AMZN, META, NFLX | “Benchmark against AAPL, MSFT…” |
| Numeric policy | Show value, as-of date, source tag | “For each metric provide value, unit…” |
| Compliance guardrails | No MNPI, placeholders when uncertain | “Never include MNPI…” |
| Tone/style | Banker-grade, crisp bullets | “Style: concise, declarative…” |
| Outline depth | 5–7 sections, 12–16 slides | “Target 12–16 slides” |
| Precedent mapping | E.g. “Meta Monetization Flywheel → Google Search/Cloud/YouTube Cash Engine” | “mapping.from\_precedent field…” |
| QA checklist | Check sources tagged, peer comps included, no MNPI | “Before final JSON run checklist…” |
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