

# IPO Lead Screener

From Filing to Relationship

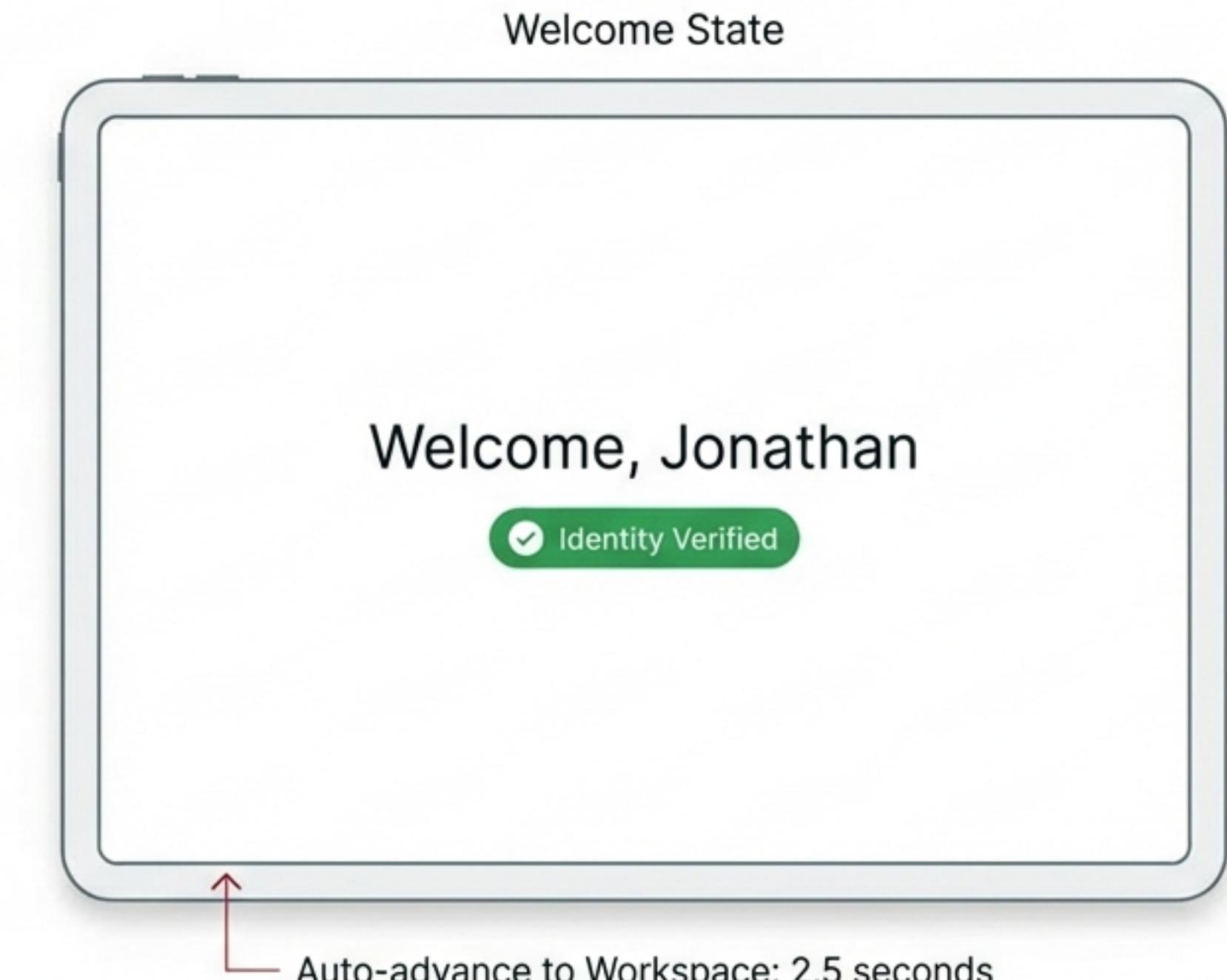
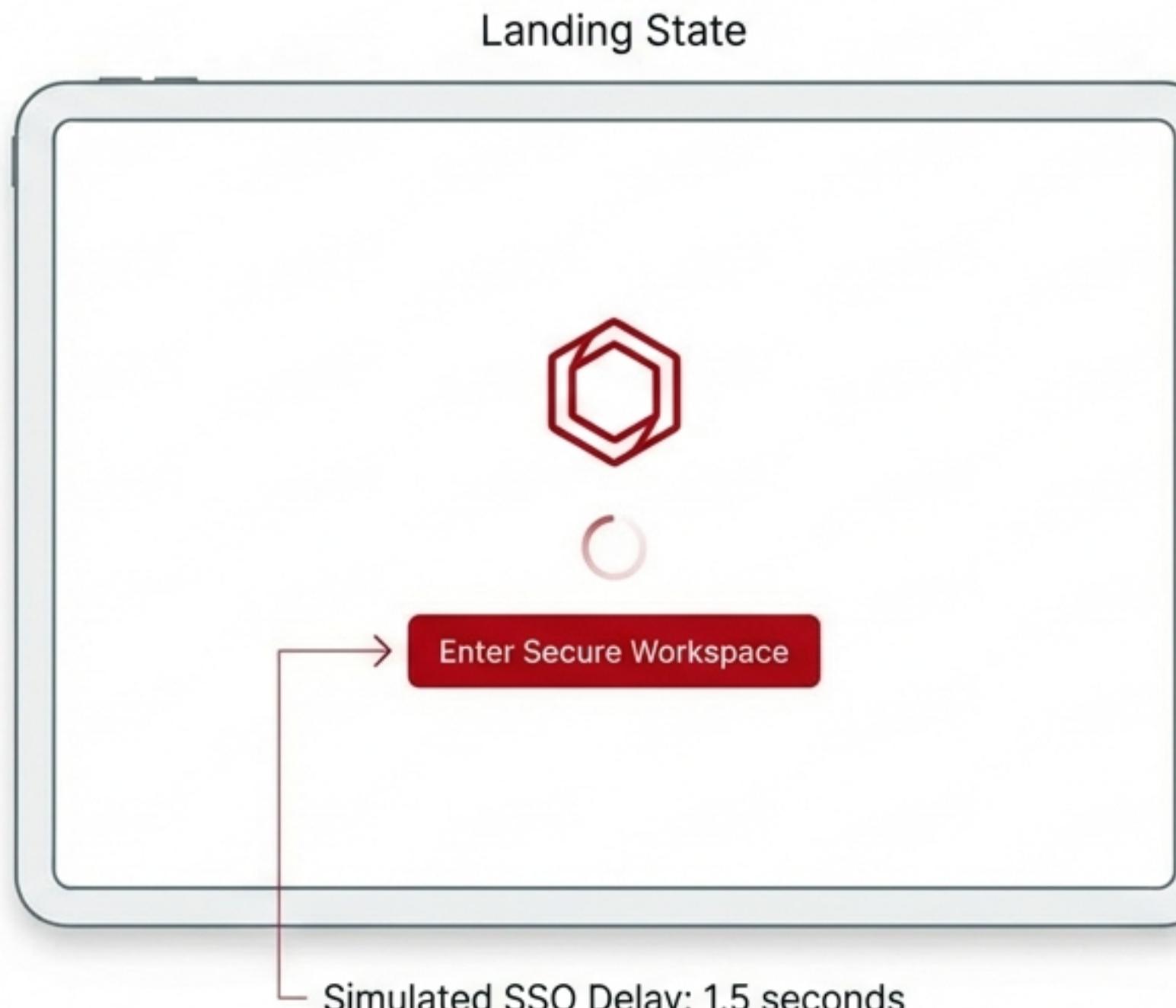
NEUE HAAS GROTESK DISPLAY

FUNCTIONAL WALKTHROUGH / INTERNAL REVIEW

# A Streamlined Path to New Business



# Security and Personalization at the Gateway



# Curating the Market via IPO Watchlist

## IPO Prospect List

Run Screening

Filter by:  Rep D... Filter by: Listing Date Filter by: Search  Search  Search

<input checked="" type="checkbox"/> Select	Company Name	Filter by: Listing Date	Listing Date	Market Cap (Est.)	Lead Underwriter	Status
<input checked="" type="checkbox"/>	TechNova Solutions	Technology	Oct 25, 2024	\$12.5B	Goldman Sachs	Filing Review
<input checked="" type="checkbox"/>	GreenEnergy Corp	Energy	Nov 12, 2024	\$8.2B	Morgan Stanley	Filing Review
<input type="checkbox"/>	BioLife Sciences	Healthcare	Dec 5, 2024	\$5.1B	J.P. Morgan	Pre-Filing
<input type="checkbox"/>	TechNova Solutions	Healthcare	Dec 25, 2024	\$5.1B	J.P. Morgan	Pre-Filing
<input type="checkbox"/>	GreenEnergy Corp	Energy	Nov 12, 2024	\$8.2B	Morgan Stanley	Filing Review
<input type="checkbox"/>	BioLife Sciences	Healthcare	Dec 15, 2024	\$5.1B	J.P. Morgan	Pre-Filing

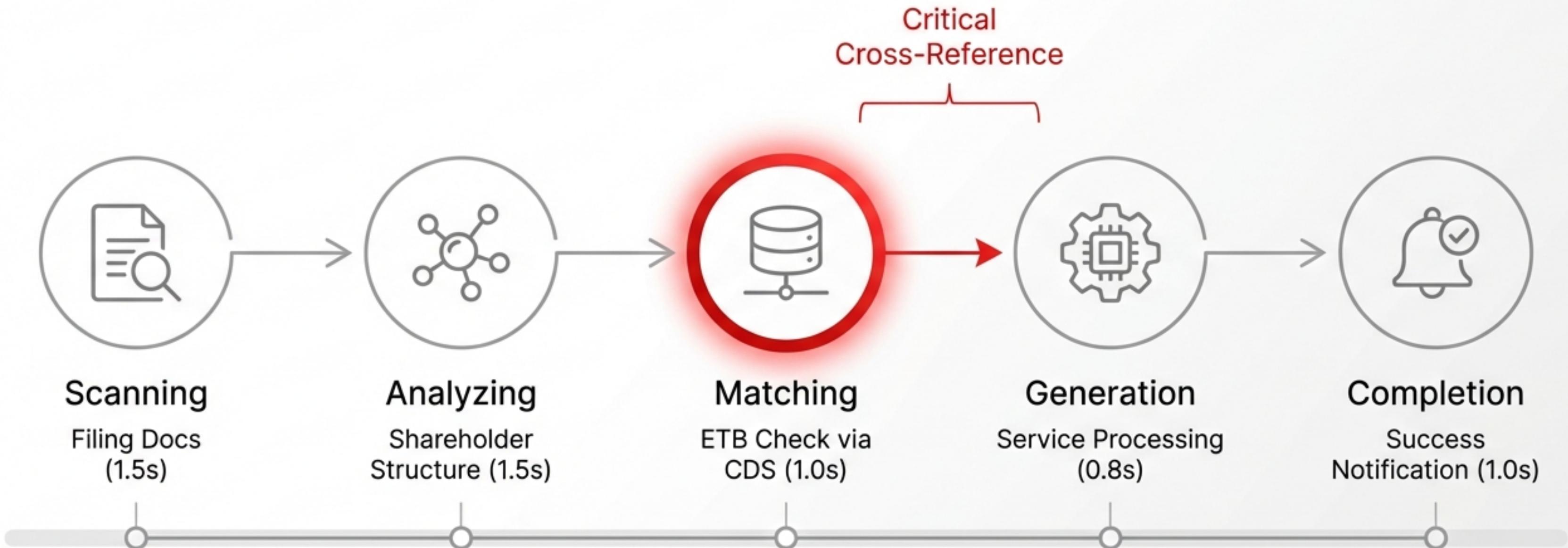
Triggers AI Simulation

Banking

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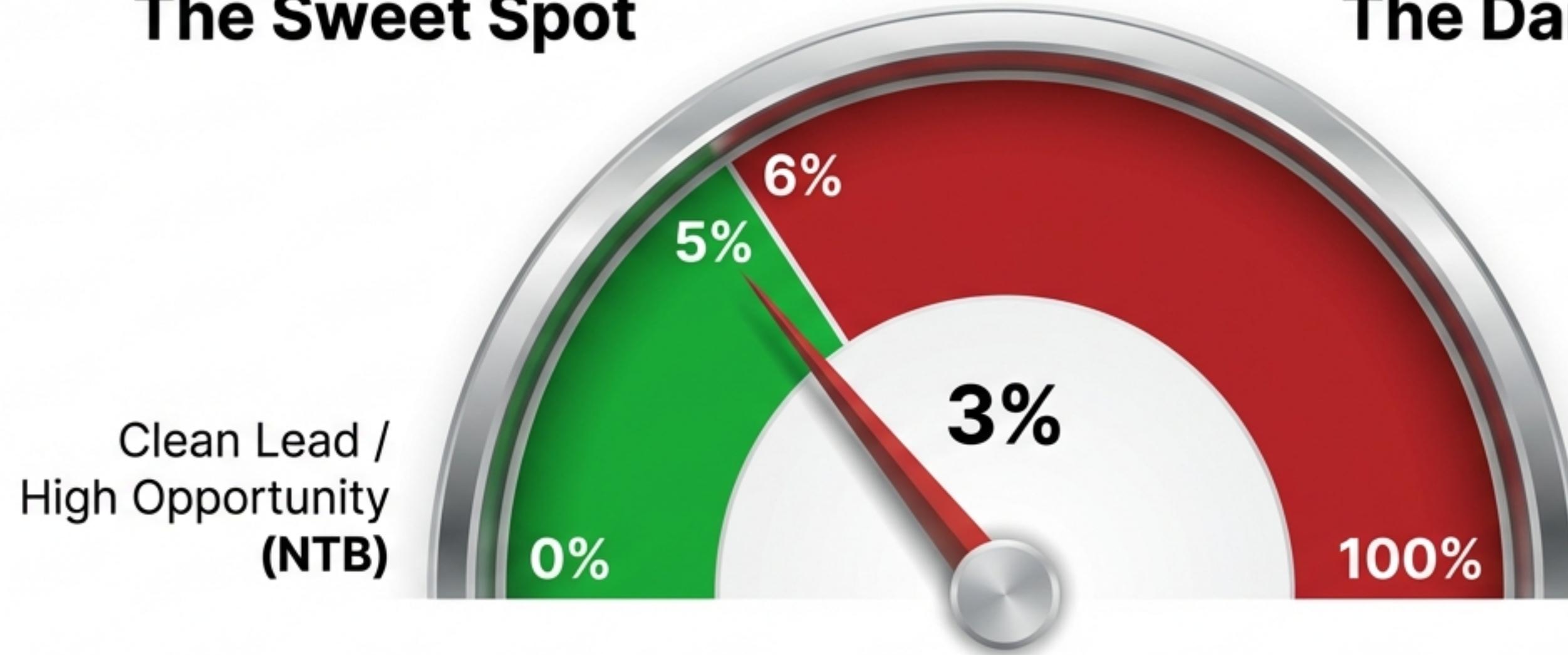
NotebookLM

# Under the Hood: The AI Simulation Process



# Quantifying Opportunity: The Match Score Logic

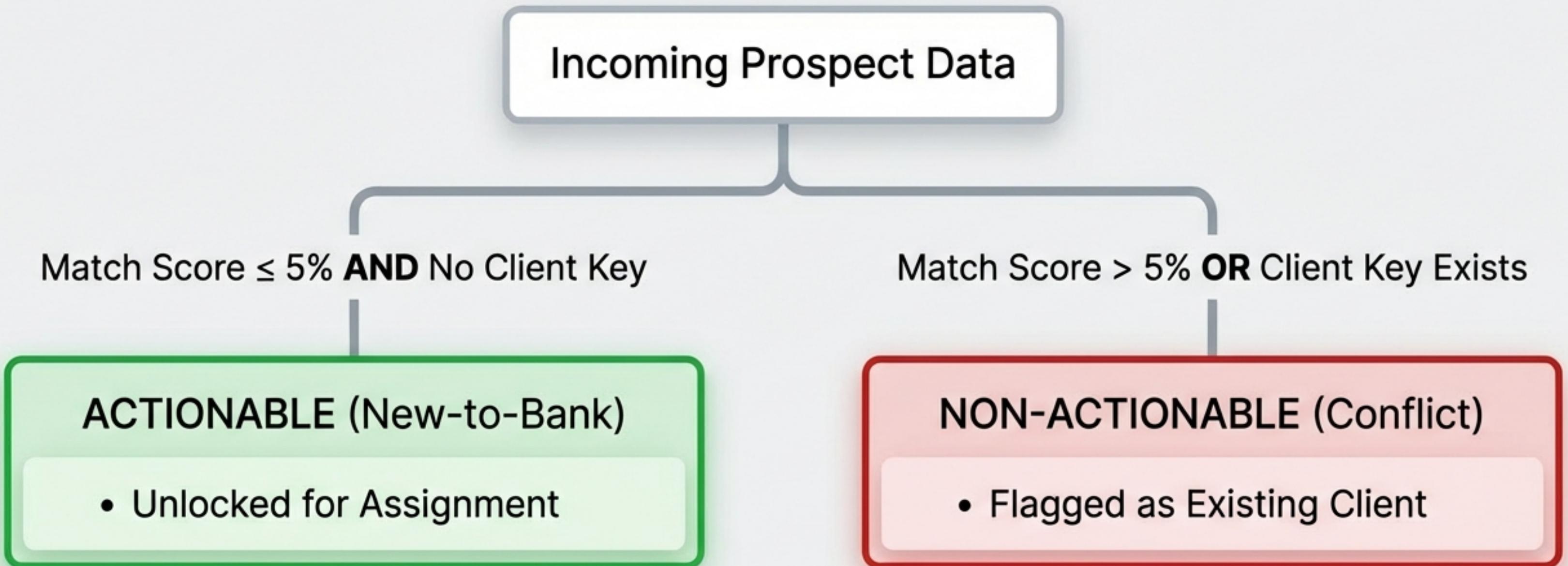
**The Sweet Spot**



**The Danger Zone**

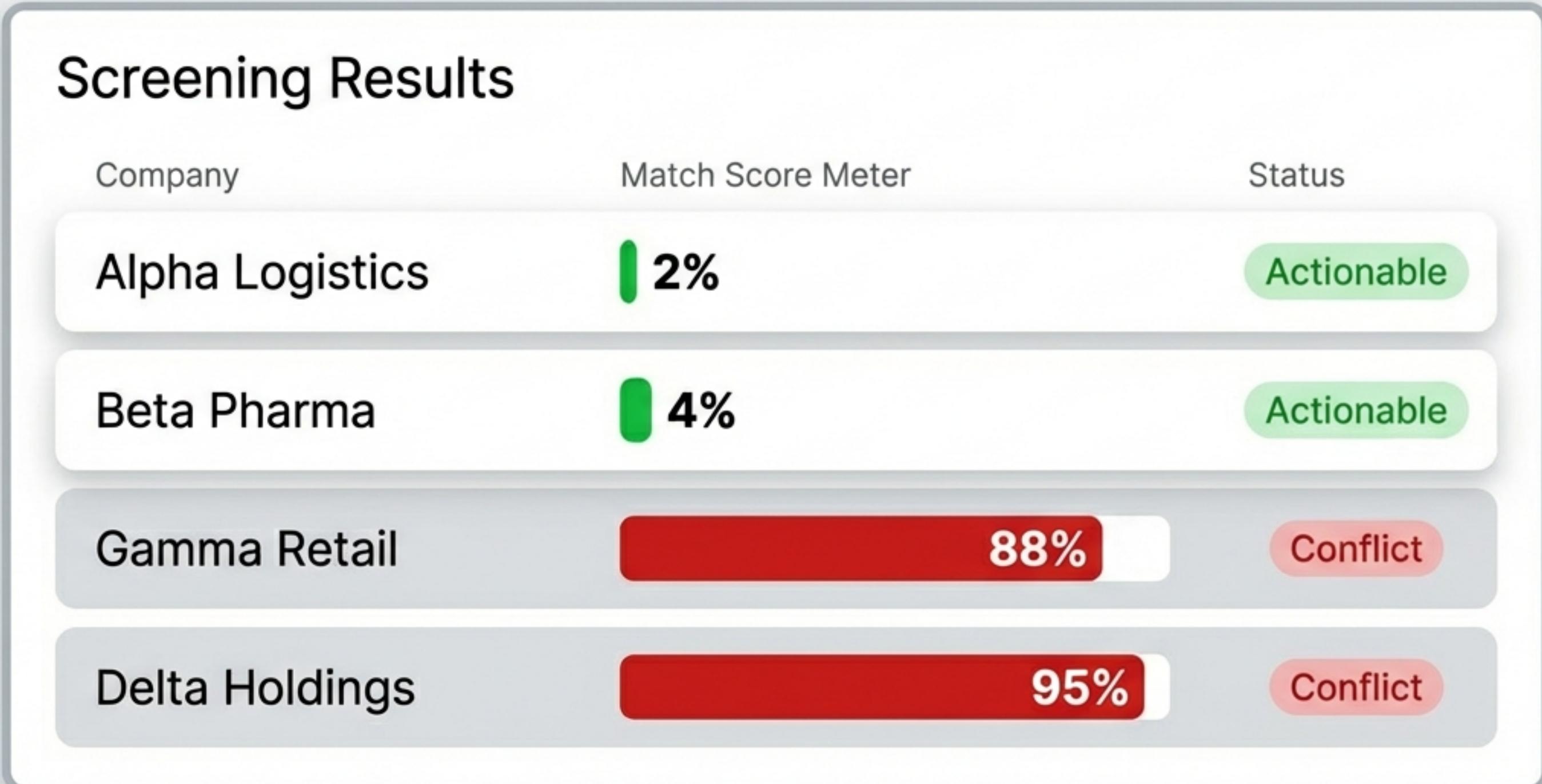
**Match Score = AI Confidence of Existing Relationship**

# Defining Actionability vs. Conflict



# Prioritizing Opportunities

## Screening Results



Sorted Ascending  
by Match Score

Banking

# Visual Encoding for Rapid Decisions

The Opportunity (NTB)

Solaris Tech IPO

Match: **1.2%**

Assign

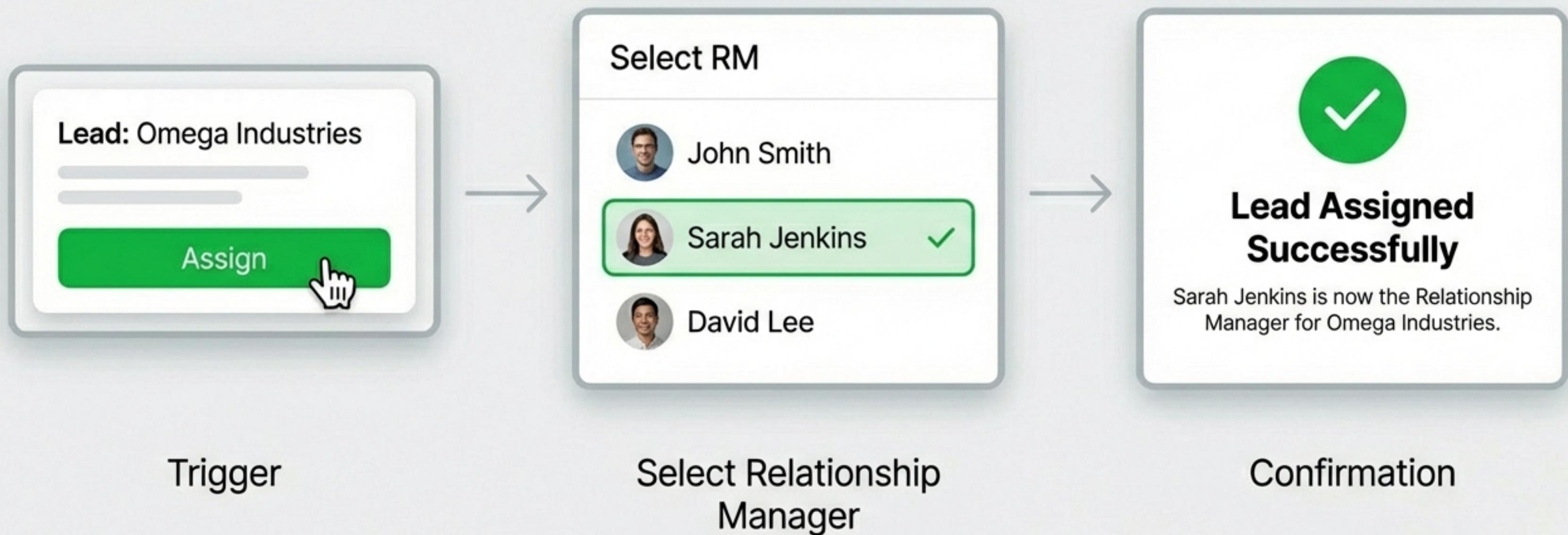
The Block (ETB)

Lunar Industries IPO

Match: **92%**

Existing Client Key: 88291

# Moving from Identification to Ownership



Trigger

Select Relationship  
Manager

Confirmation

'Banking

# Integration with the RM Workbench

IPO Lead Screener



PB MSD - RM Workbench



Secure Data Handoff

CRM Follow-up &  
Relationship Management

'Banking

# Precision, Compliance, and Speed



Secure  
Access



Intelligent  
Filtering



Visual  
Safeguards



Seamless  
Handoff

Internal Functional Specification Complete

'Banking