CAPITAL MARKETS INTELLIGENCE

KADE is an intelligence infrastructure layer

that brings portfolio, risk and research findings into one review, alongside existing systems.

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KADE
INTELLIGENCE INFRASTRUCTURE



CONNECT THE EVIDENCE BEHIND A DECISION

Investment and risk teams often have to reconcile portfolio data, research and policy checks before a decision reaches committee.

KADE brings findings from permitted sources together, shows where they agree or differ and keeps the evidence in view.

EVIDENCE STANDARD

Every finding carries its source, its assumptions and what it could not establish.

PRODUCT STATUS

IN STAGING
TELESCOPE core and selected access workflows

IN DESIGN
Policy Lenses, Shariah first, and analytical Chat

PLANNED
Developer Centre and in-country deployment

PILOT WORKFLOW

01	**SELECT SOURCES**	Define the permitted market data, portfolio records, research and risk models.
02	**RUN THE ANALYSIS**	KADE compares the sources and records evidence, assumptions and gaps.
03	**REVIEW THE FINDINGS**	Review findings and open questions within the agreed institutional process.
THE INSTITUTION RETAINS THE DECISION		Existing systems remain the authoritative record.

PUT THE EVIDENCE IN THE COMMITTEE BRIEF

This illustrative brief shows how findings, supporting evidence and unresolved questions could be presented to a committee.

ILLUSTRATIVE COMMITTEE BRIEF

Concentration warrants review

31.6%
Sector share of portfolio NAV

25.0%
Illustrative review threshold

SOURCE	Fictional holdings file dated 30 September 2026. Sector classification at GICS sector level.
ASSUMPTION	Positions valued at month-end prices.
OPEN QUESTION	27.6% of NAV lacks a complete return history and falls outside the risk comparison.

Fictional holdings and illustrative calculations

THREE LEVELS OF INVESTIGATION

BRIEF

Surface the key finding and why it matters.

STANDARD

Compare options, test scenarios and identify trade-offs.

DEEP

Test the investment case against contrary evidence and document the assumptions.

The levels describe analytical effort.
A short brief can draw on a deeper investigation.

Applications include portfolio reviews, sector research and monitoring briefs.

TELESCOPE

SEE WHAT CHANGES THE PORTFOLIO VIEW

TELESCOPE is KADE's synthesis layer, designed to show where selected findings agree, differ or lack evidence. Eight lenses are specified and mapped: Portfolio, Momentum, Trend, Volatility, Risk, Opportunity, Liquidity and Correlation.

ILLUSTRATIVE PORTFOLIO QUESTION

Which holding could be hardest to exit under stress?

LIQUIDITY	Holding A takes 20 trading days to exit under stress.
PORTFOLIO	Holding A is the largest position, at 9% of NAV.
VOLATILITY	Holding A's price series sits within the portfolio's normal range.
CORRELATION	No joint-return history. Unresolved.

Fictional inputs and calculations

SYNTHESIS CORE IN STAGING

SYNTHESIS Liquidity and Portfolio agree that Holding A is the exposure to watch. Volatility differs, suggesting the main risk is exiting the position. Correlation remains unassessed.

IN DESIGN

POLICY LENSES

Policy Lenses are designed to assess findings against institutional rules and record the reasons. Shariah is the first instance in design.

Other areas under consideration include mandate drift, ESG, concentration, regulatory suitability and bespoke screens.



USE CASES

Nine use cases for institutional evaluation, from portfolio review and research to monitoring and policy assessment.

PORTFOLIO AND RISK

Portfolio review
Review holdings and exposures in context.

Risk and resilience
Examine vulnerabilities and test scenarios.

Objective-led reviews
Assess a portfolio against a defined goal.

Holdings and alternatives
Compare a position with other ways to gain exposure.

INVESTMENT RESEARCH

Asset research
Investigate an issuer or asset and test the investment case.

Sector opportunity
Map a theme and shortlist candidates for research.

MONITORING AND POLICY

Morning brief
Identify developments that warrant attention.

Event assessment
Assess the implications of a significant event.

Firm policy check
Check supplied rules and flag missing evidence.

FOR INVESTMENT AND RISK TEAMS

KADE is for institutions that have to explain the evidence behind an investment decision.

INTENDED USERS

Asset managers and hedge funds

Compare portfolio exposures, risk and liquidity before a position is reviewed.

Sovereign and institutional investors

Bring research, risk findings and mandate considerations into investment committee review.

Family offices and wealth managers

Bring scattered portfolio information into one review for principals and their investment teams.

Banks and financial platforms

Bring analysis and its supporting evidence into an existing workflow or product.

DELIVERY ROUTES

Delivery routes include direct use, customer branding and embedding.
Embedding depends on the Developer Centre, which is planned. For each deployment, KADE and the institution agree permitted sources, processing locations and access requirements.



FROM A QUESTION TO A SHORTLIST

The example shows the analysis path, independent of interface. Analytical Chat is in design.

ILLUSTRATIVE RESEARCH CONVERSATION

START	Is investing in data centres still attractive as AI demand grows?
COMPARE	Operators face utilisation and capital-cost risks. Power suppliers face order conversion and margin risks.
INVESTIGATE	Build a dated shortlist and assess valuation and execution risk before choosing a candidate for deeper research.

Extending this to a policy check or an allocation view needs the firm's rules, holdings and funding assumptions.

WHAT A PILOT DELIVERS

THE INSTITUTION SUPPLIES	One agreed question, the permitted sources and named reviewers.
KADE RETURNS	A brief at the agreed level, findings by lens showing agreement, difference and gaps, and a list of open questions.
EVIDENCE	Every finding shows its sources, assumptions and what could not be established.
REVIEW	The institution's team reviews every finding before it is used. Existing systems remain the authoritative record.
SCOPE	Both parties agree the duration and success measures for the pilot's scope before it begins.



START WITH ONE INVESTMENT QUESTION

A pilot starts with one portfolio or research question. The institution and KADE agree the permitted sources, deployment requirements and how to test the usefulness and traceability of the result.

DEVELOPMENT STATUS

The synthesis core is in staging.
Any deployment follows validation with the institution.
In-country deployment is planned and not yet certified.

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