

Intellias

From AI Process Automation to Autonomous AI Agents in Capital Markets

Getting ready for the shift



Andre Nedelcoux

SVP, Financial Services & Insurance

Meet the Intellias team

EVENTS



Meet me at...
AI in Finance
Summit Fall

Andre Nedelcoux,
SVP of FSI Business

October 21-22
Hoboken, US

Intellias

EVENTS



Meet me at...
AI in Finance
Summit Fall

Lori Robertson,
Sales Director FSI

October 21-22
Hoboken, US

Intellias

EVENTS



Meet me at...
AI in Finance
Summit Fall

Yaroslav Musii,
Delivery Director FSI

October 21-22
Hoboken, US

Intellias

Who is Intellias

24 years of helping companies grow, modernize and compete

3,000+	130	96.9%	15%	15	\$250m
Current Headcount	Active clients	2025 Global CSAT Score	Year-to-year revenue growth	Global locations	Annual Turnover (2025)

Capital Markets specialists

We operate across the full value chain, with ex-industry DNA

Data & AI experts within regulated environments

We advise on Data & AI, engineer the associated foundations, apply AI and Agentic AI software development to transform our customer's business

Consulting-led delivery, Agentic AI nearshore engineering

We work backwards from our customer's problems and opportunities and co-create through smaller, more senior teams with frontier tooling













DATA & AI CONSULTING
APPLIED AI
PRODUCT ENGINEERING
AI MODERNIZATION
PLATFORM ENGINEERING



Let's start with a customer story

Enabling agentic AI at a global investment manager: four business use cases on shared foundations

THE CLIENT

A global alternative investment manager

One of the world's largest publicly listed hedge fund groups and a pioneer of systematic, data-driven investing

\$250bn+

assets under management

20+ years

of quantitative investing heritage

~5PB

of licensed market data held in-house

The challenge Four agentic AI use cases focused on signals discovery, client experience, speed and quality

Market data access

Right data and code from a plain-English question, no internal IDs; fewer paid external API calls

For: quant researchers and Agents

Fund, performance & risk

Client fund questions answered in minutes, not days

For: sales, client, risk teams and Agents

Document intelligence

Cited answers across ~30,000 legal and vendor contracts

For: Legal, Finance, Risk and Agents

Unified data discovery

One semantic front door to all firm data, with trust signals

For: portfolio managers, Analysts and Agents

Our approach Work backwards from use cases, build foundations in parallel

Work backwards from use cases

Target questions agreed with business users; iterative phases, each measured against an eval baseline

Get data "AI ready" with a semantic layer

One governed catalogue: owners, freshness, quality and routes for agents across all data types (structured, unstructured and alternative)

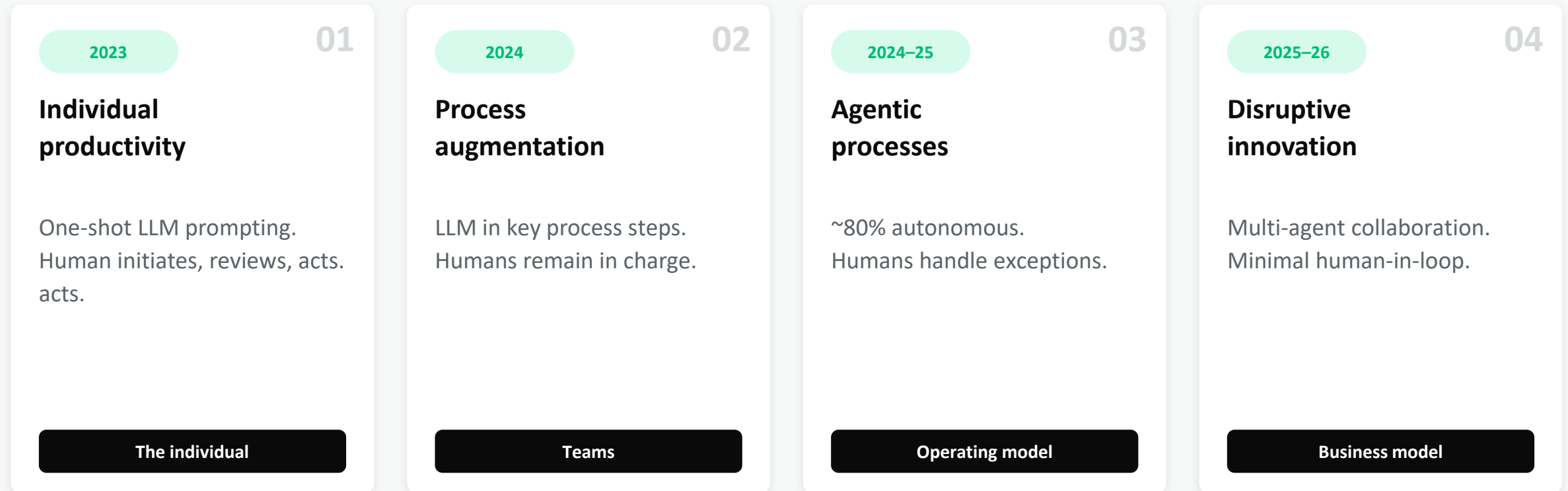
Build AI foundations: security and permissioning

Central authorisation, temporary task-scoped credentials and network isolation for every agent

Technology environment **Anthropic Claude / AWS Bedrock** as the agent layer via MCP servers and Skills - DataHub metadata catalogue - hybrid semantic and keyword retrieval on Airflow and Postgres - Bloomberg and vendor data APIs - SharePoint document estates

The complexity of AI projects has increased rapidly

The industry is slowly moving up this ladder

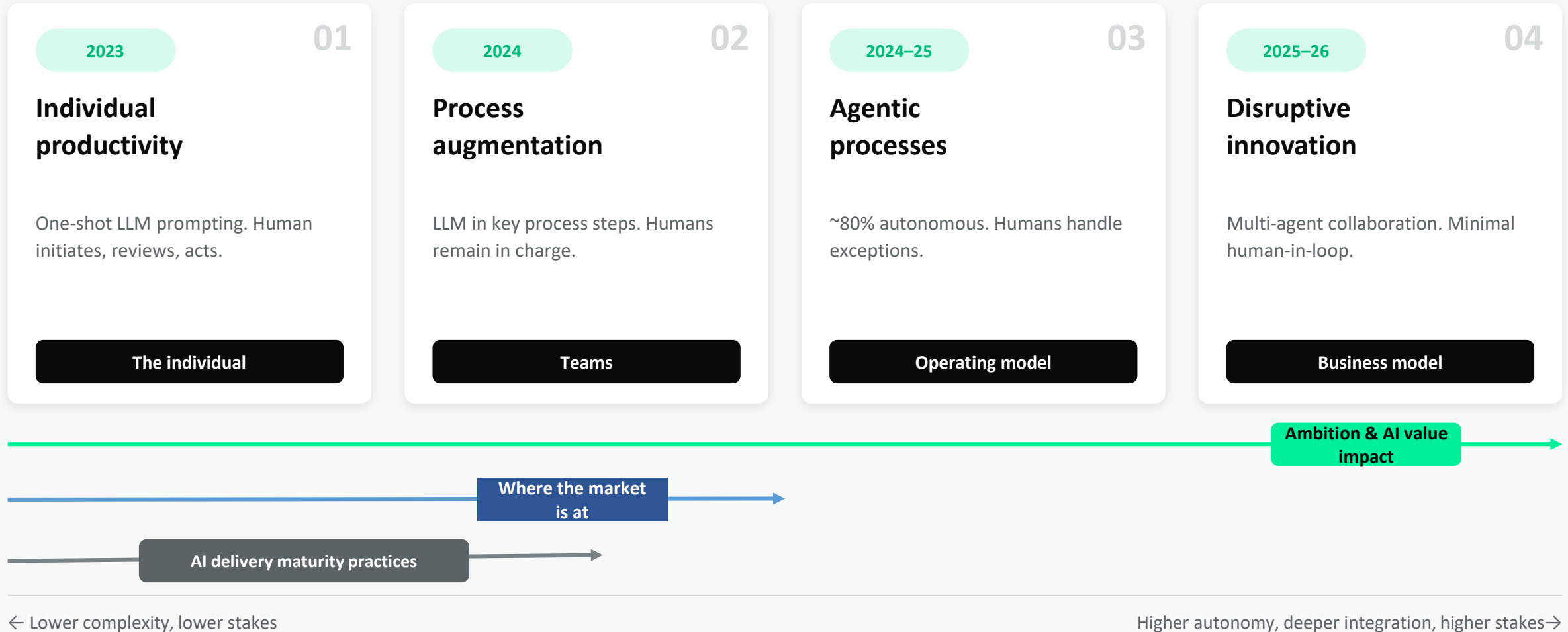


← Lower complexity, lower stakes

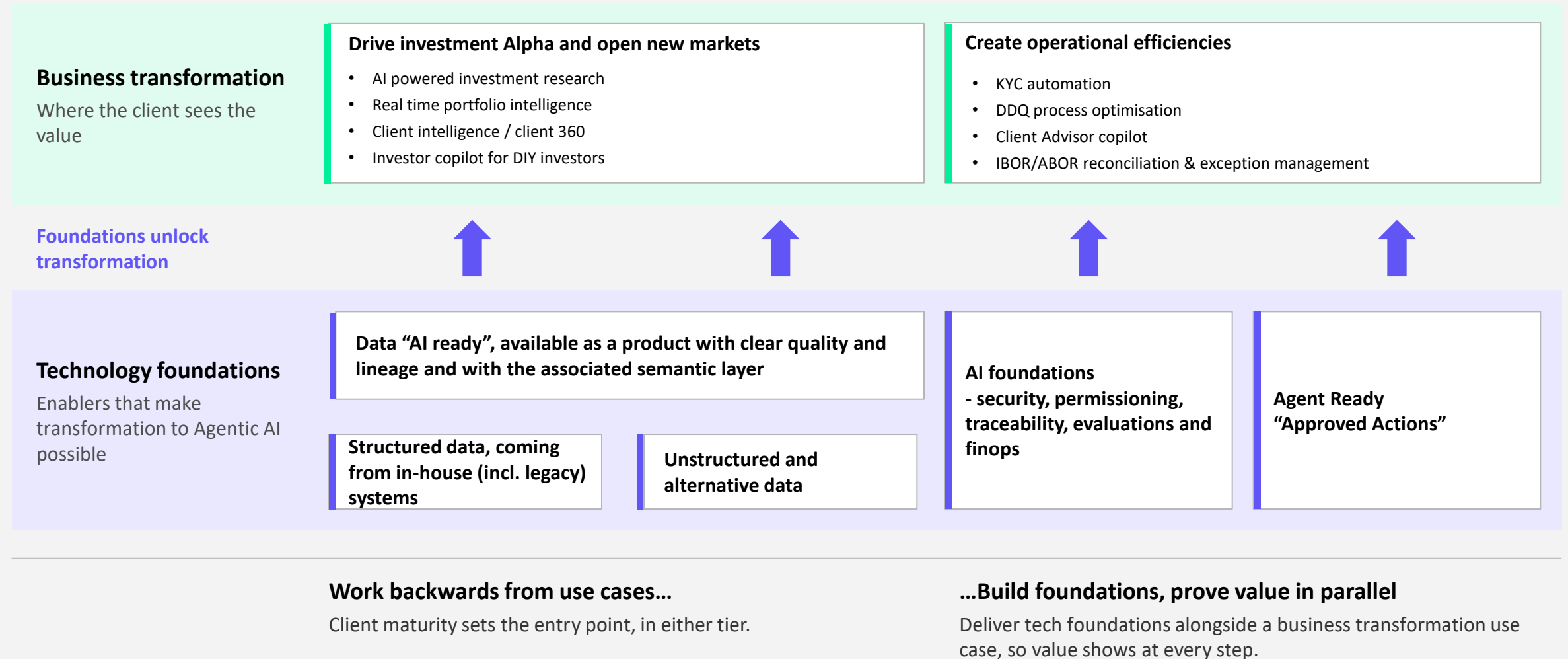
Higher autonomy, deeper integration, higher stakes→

But practices and ambition misalignment create friction and frustration

The AI value everyone talks about is at the disruption phase, but the market hasn't got there yet



Aligning foundation building and business value creation

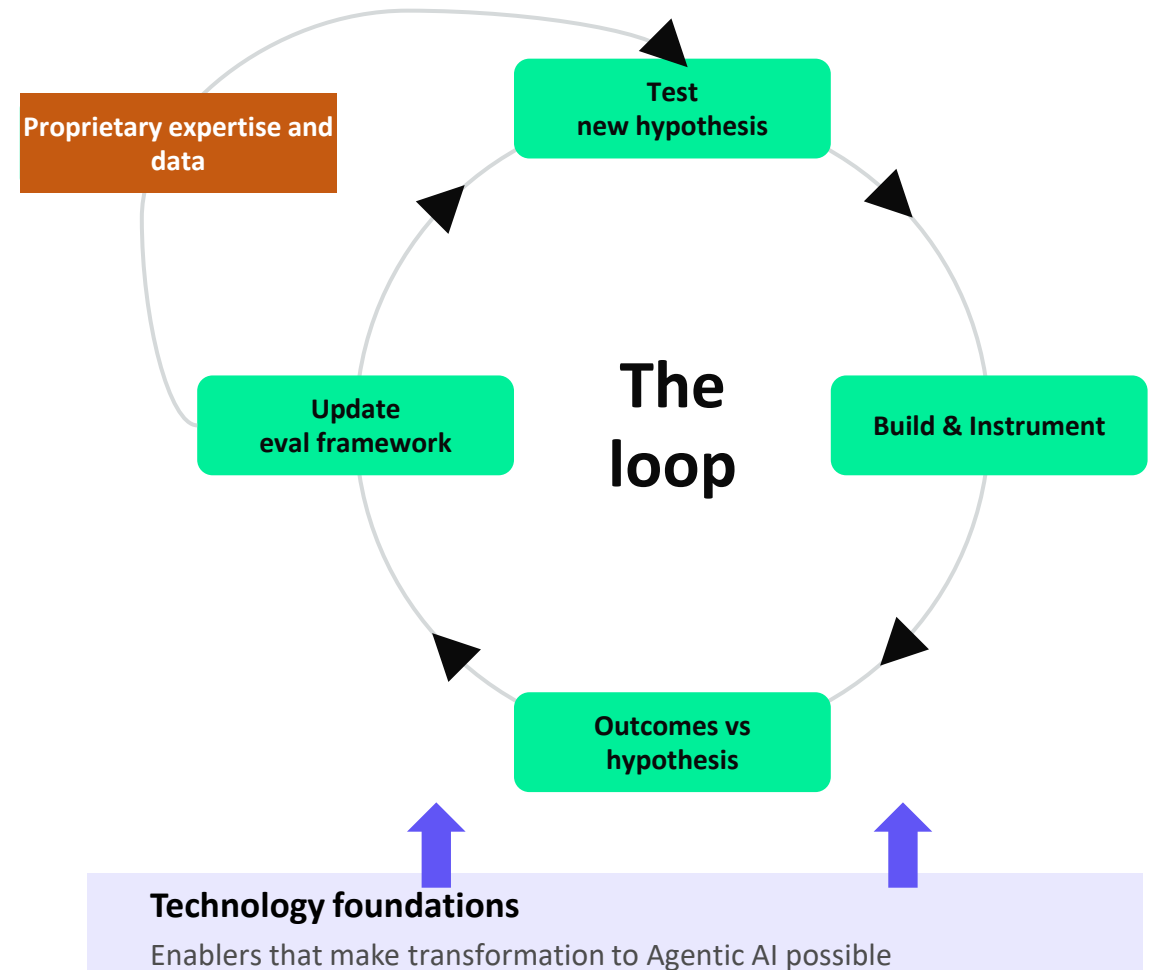


Owning your feedback loop and deliver AI value through an iterative approach

A competitor can replicate your model, your architecture, even your data strategy.

What they cannot replicate is your flywheel: the ability to rapidly iterate on hypothesis and learnings, leveraging in-house proprietary data and skills aligned to your organization's USP

The loop is the moat, proprietary expertise and data create the flywheel



Let's discuss

01

Where are you seeing value being created from AI in your organization?

02

What are the blockers to unlocking more value, faster?

03

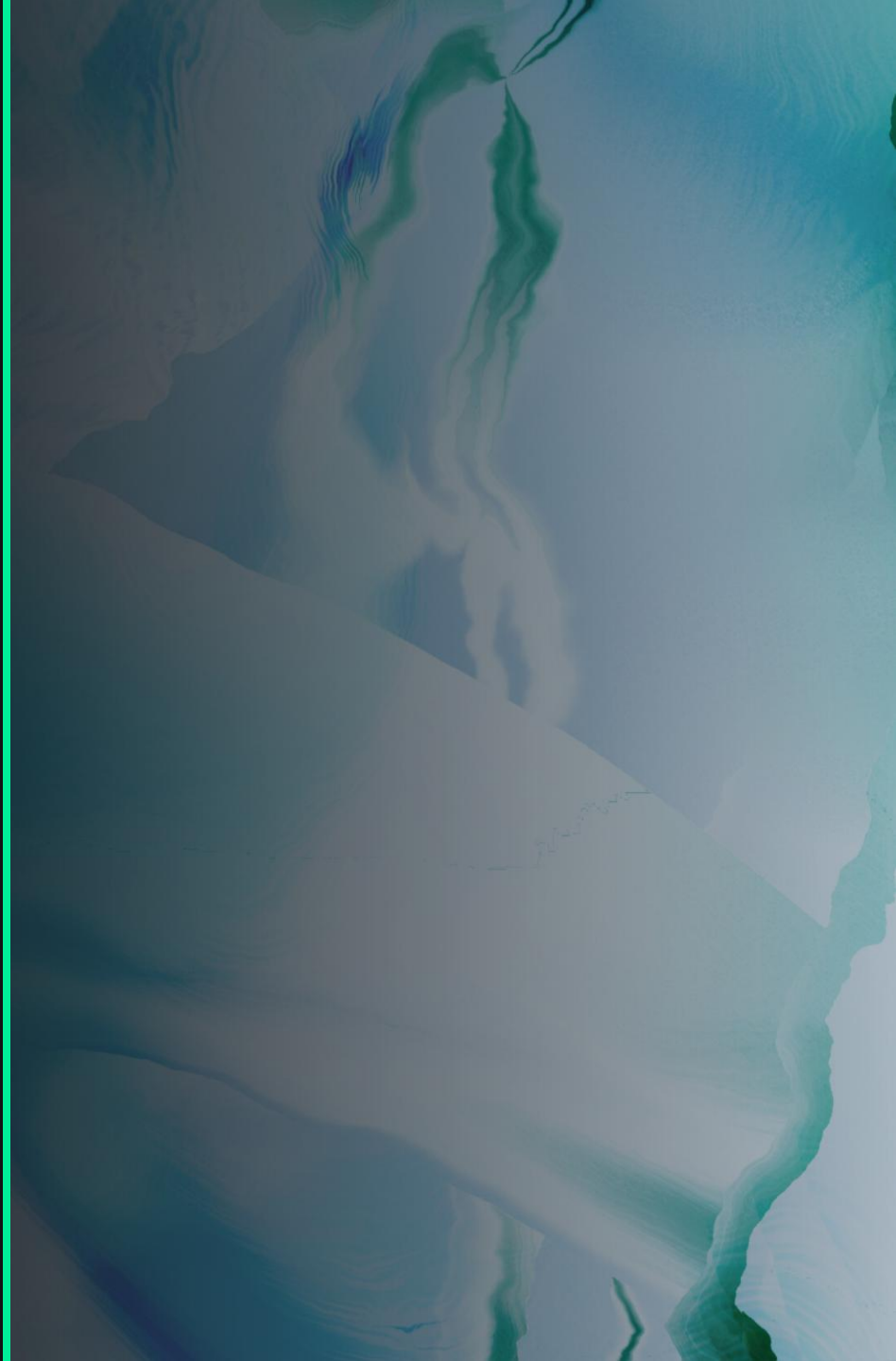
What do your foundations look like?

Intellias

Thank you

Clear outcomes ahead

intellias.com

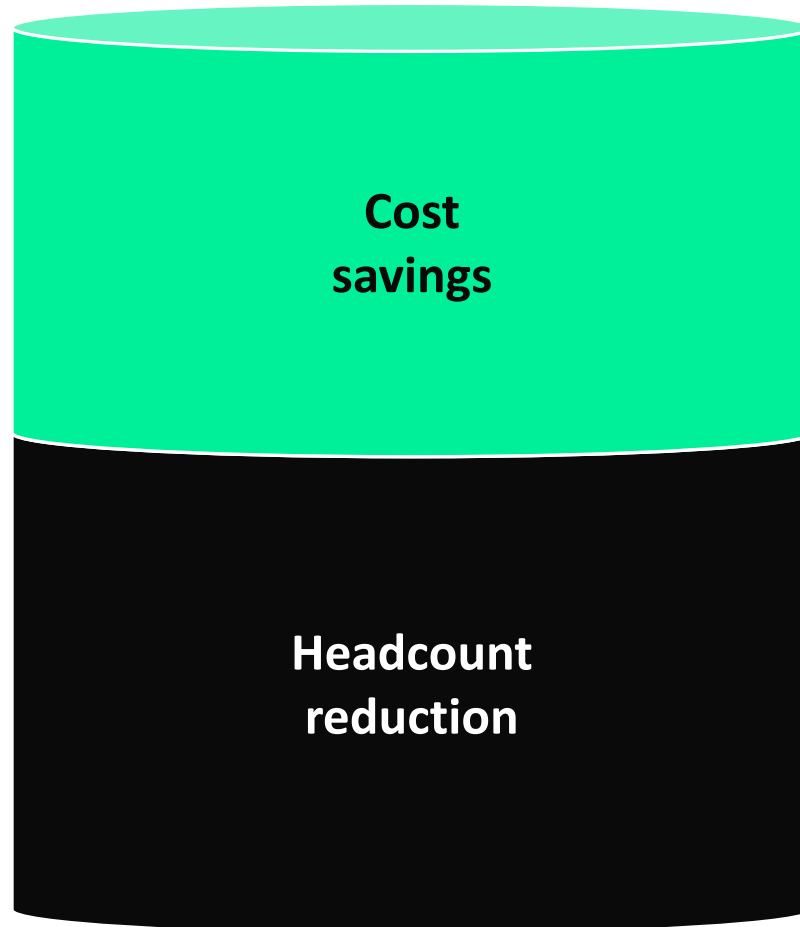


"From AI Process Automation to Autonomous AI Agents in Capital Markets: Getting Ready for the Shift"

Agentic AI isn't a faster version of the process automation financial services firms have already deployed — the shift to systems that plan, decide, and act autonomously raises an entirely new set of organisational questions that last year's projects never had to answer. Where those projects worked with whatever data you had, agents demand that your data is genuinely ready: the right information, in the right shape, accessible in the right way — across both the structured systems of record and the unstructured knowledge your organisation runs on. They also require clear boundaries around what they're permitted to do and a rigorous framework for evaluating whether they're behaving the way you intended, at scale and over time — particularly in an industry where the cost of getting it wrong is high.

Join us to share experiences and explore the challenges and opportunities of scaling Agentic AI in the industry.

What **execs think** AI ROI is



What AI ROI **really** is



How do you create this feedback loop?

1

Take an iterative hypothetis-based approach (over “THE FINAL business case”)

Define the outcome before writing code. Instrument every production system to measure. Improve continuously as you learn more.

2

Build an AI platform

Right size your AI capability with your ambition, build the platform incrementally

3

Build your engineering practices

The bottleneck as moved from producing and testing code to expressing what to build and build it following best practices

4

Treat data as a product and invest in a semantic layer

Durable, versioned, owned data assets reusable across models. And a semantic layer which allows Agents to discover and use all data with no ambiguity

Different complexities require different AI capabilities

Enterprise AI capabilities need to be built incrementally to satisfy the requirements of a regulated environment

01

Individual productivity

Enterprise ChatGPT

02

Process augmentation

Observability & FinOps

Prompt management

Foundational guardrails

Manual governance

03

Agentic processes

Model registry

Automated evals

Policy-driven governance

Data Management capability

04

Disruptive innovation

Intelligent routing and orchestration

Federated governance

Enterprise risk integration

Multi-LLM deployment

Combined Data and AI platform

← Lower complexity, lower stakes

Higher autonomy, deeper integration, higher stakes→

In practice, failure manifests itself as...

1 PoC was promising, but couldn't put the solution in production for regulatory reasons

SR 11-7, EU AI Act or internal model governance killed the project

2 PoC was promising, but the value (accuracy and quality) degraded once in production

We had to upgrade our Claude Opus version and quality went through the floor

3 The business case was based on realizing efficiencies which couldn't be realised

Outputs are higher quality, arrive faster and with more accuracy – but our cost base hasn't changed

4 What was built delivered modest results and was ultimately replaced by a Claude feature

The focus for AI wasn't top-down value (=the meaningful problems for the organization) but the cool, tech projects identified bottom up

5 The pilot was treated as pass/fail

It didn't quite work out as expected, now the blame game commences