

Beyond the Chatbot: Engineering a Workable Investment Machine

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Last September, we shared how our firm began [integrating artificial intelligence](#) into our value investing framework. At that time, AI was merely a conversationalist—a tool for brainstorming and content scaling. Today, we are moving beyond simple chat interfaces to build a workable, upgradeable, and controllable investment infrastructure.

Investor Engagement

We believe an investment firm's edge is defined by the quality and accessibility of its internal data. To maintain this edge, we are currently replacing static databases with an AI-enhanced pipeline. Our first area of implementation focuses on the source of our market feedback: the investor engagement process.

When we host a webinar or an investor meeting, our AI workflows now manage the entire lifecycle of the event: transcribing consented conversations, summarizing key discussion points, and helping prioritize follow-up based on investor requests. This transforms a standard CRM from a passive address book into an intelligent mechanism that understands investor intent.

This intelligence extends into the most rigorous stage of engagement: the Due Diligence Questionnaire. The administrative burden of answering sophisticated allocator queries is significant, but by deploying Gemini-based workflows and specialized environments like NotebookLM, we are in the process of automating approximately 80% of the DDQ process. By feeding the AI our historical filings and proprietary philosophy, we ensure consistency across all global communications. This allows our senior team to move straight to the final 20% rather than being bogged down in repetitive boilerplate.

The Research Engine

While the benefits of AI are highly visible in our investor engagement, its most vital application is at the

heart of our research desk. Our infrastructure combines the precision of traditional automation with the interpretive power of AI. While our data models for A-shares are already highly automated through standardized reporting, the HK and US markets require significant manual adjustments for accounting differences and non-recurring items.

We are building a feedback loop where our analysts "complain" against the automated output. When a human identifies a necessary adjustment, the AI analyzes the reasoning behind that change to help us codify it into a systematic library of rules. This allows us to map complex accounting nuances across the HK and US universes: a task that would be too tedious for manual documentation, but which creates a proprietary upgrade to our automated models.

Beyond the numbers, we are also in the early stages of capturing our internal consensus building process. We are implementing workflows where AI doesn't just analyze the final research report, but instead identifies the delta between a company's annual report narrative and the difficult questions raised during our internal meetings. By documenting these discussions, we are beginning to track the specific nuances behind how our convictions evolve, ensuring the 'why' behind our conviction is recorded just as clearly as the final numbers.

A Disciplined Path Forward

Our approach to AI is intentionally pragmatic. We aren't interested in chasing the latest chatbot trends; we are focused on building a system that is workable, upgradeable, and controllable. By moving away from generic chat and toward these integrated workflows, we are ensuring that our proprietary logic is captured and improved upon every day.

The goal remains unchanged: we are not replacing the human element of value investing. We are simply ensuring that our team spends their time on judgment, while AI helps us navigate the complexity of the modern data universe.

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