How agentic AI accelerated investment decisions for a global firm

Fragmented research was slowing down critical decision-making. That's why a top global investment firm partnered with GlobalLogic to streamline how teams access, analyze, and apply insight across the deal lifecycle. An agentic AI assistant now automates reviews, accelerates analysis, and supports more structured decisions — delivering measurable gains including:

30%
less time to gather and reshape information

25%
higher engagement with analytical tools

25%
reduction in early-stage memo review effort

Challenge

With investment research scattered across emails, memos, and dashboards, analysts spent too much time chasing information and not enough interpreting it.

Manual review cycles slowed progress, and analysts often spent hours reconstructing fragmented research threads — with critical insights frequently lost in handoffs or turnover. Despite digitized core workflows, the client lacked a cohesive way to surface relevant data, connect patterns, and guide decisions across teams.

They needed an AI-driven solution that could reduce effort, improve consistency, and bring structure to high-stakes thinking.

GlobalLogic
A Hitachi Group Company

Value Created

- **AI-assisted documentation** – Generated memos, reviews, and summaries to reduce manual lift and speed preparation.

- **Intelligent insight retrieval** – Real-time, role-aware search that surfaces what matters without hunting through files.

- **Agentic decision support** – Contextual guidance that helps teams think faster, align sooner, and act with confidence.

Impact

- **30% less preparation effort** – Agentic tools helped teams work faster with fewer iterations.

- **25% higher tool engagement** – Increase in usage signals faster access to relevant insights.

- **Improved knowledge retention** – A centralized system made insights easier to find, share, and preserve.

- **Scalable, role-aware adoption** – Teams across the investment process gained value from shared intelligence.