



AI-Powered Wealth Management Platform

Innovative insights for asset managers and family offices, seamlessly integrated with Salesforce

gAln360 is a cutting-edge digital platform designed to revolutionize how asset managers and family offices analyze large datasets and predict asset performance.

Utilizing advanced AI and machine learning algorithms, gAln360 provides personalized securities forecasts, helping businesses make informed investment decisions. Integrated with Salesforce Financial Services Cloud, gAln offers a comprehensive end-to-end service that enhances both market analysis and customer relationship management.

Key Features and Benefits

1 Advanced AI-Based Forecasting

Our proprietary machine learning models leverage over 20 financial indicators (such as Exponential Moving Average, Bollinger Bands, and more) to deliver accurate, multi-timeframe forecasts for stock prices. The forecasts cover three-time horizons: 11, 21, and 63 trading days.

2 Salesforce Integration

Automatically sync market data and client engagement activities with Salesforce, allowing wealth managers to provide personalized, data-driven services to their clients. The integration ensures a unified view of market performance and customer relationship management.

3 Real-Time Data Insights

gAln captures and analyzes market data daily, ensuring that its predictions are based on the most current information. With built-in clustering and metamodeling, gAln delivers precise forecasts for each asset class.

4 OpenAI Integration

The integration with our financial database allows users to query complex market data using natural language for easy access to insights. It provides personalized portfolio analysis, detailed market reports, and custom investment guidance, enhancing financial decision-making.



Comprehensive Market Coverage

gAln360 empowers clients with insights across industries, exchanges, and asset types, providing a broad and deep view of global financial markets.



16 Exchanges

United States
United Kingdom
Germany
France
Hong Kong
...



9 Asset Type

Shares
ETF
Mutual Funds
Currencies
Cryptocurrencies
...



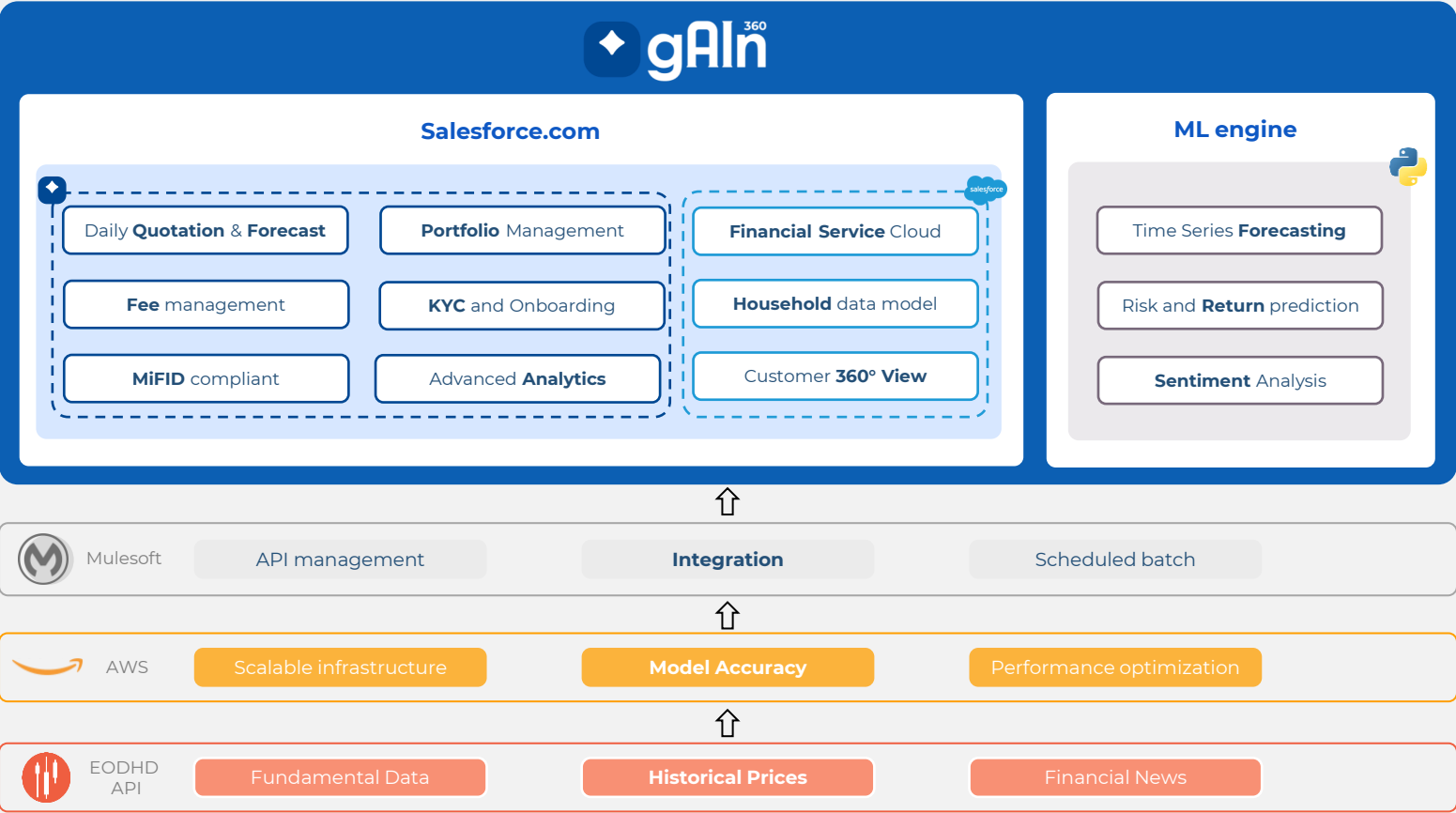
21 Industries

Energy
Healthcare
Technology
Food & Beverage
Real Estate
...



High level architecture and capabilities

gAln360's architecture integrates powerful databases, dynamic APIs, and top-tier technologies like MuleSoft and Salesforce, creating a seamless and adaptable framework for optimal data processing and client engagement.



Additional Enhanced Integrations

- › **Anti-Money Laundering (AML):** Access to comprehensive sanction lists, PEP databases, and crime-related news (e.g., SECO, OFAC, EU), with customizable search criteria to minimize false positives and missing cases. All data is potentially integrable via API.
- › **Bank Order System Integration:** Streamlined connection with banking systems to facilitate seamless order processing and execution.
- › **Automated PDF Generation for Contracts:** Capability for automatic generation of PDF contracts directly within the CRM system, reducing time and manual effort for documentation.
- › **Third-Party Data for Sustainability Indices:** Integrate external sources for real-time sustainability indices, providing insights for investment decisions aligned with environmental, social, and governance (ESG) criteria.

About Us

gAln360 is built on a strong foundation of interdisciplinary expertise, uniting AI, Salesforce integration, and cloud infrastructure to create a robust, adaptable platform. Over the past four years, our ML/AI team has refined its machine learning models to deliver accurate, customized solutions tailored to client needs.

Since November 21, 2022, GainAlphaFund has leveraged gAln360's predictive algorithms to construct an all-equity, non-hedge, long-only portfolio of 30 high-cap US and Eurostoxx50 stocks, achieving an annual alpha of 2.2% over benchmark indices.

In early 2024, we enhanced our platform with Salesforce integration for seamless data interaction within the CRM



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