



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, **predict asset performance and grant full customer lifecycle coverage.**

Powered by a sophisticated **ecosystem of AI Agents**, gAln360 offers real-time insights and next-generation automation to **support smarter decision-making at every level.** Its seamless **integration with Salesforce Financial Services Cloud** **ensures** a fully unified, **end-to-end experience** for market analysis and client lifecycle management.

Key Features and Benefits



Advanced AI-Based Forecasting

gAln processes daily market data, combining sentiment signals, clustering, and metamodeling to deliver reliable conformal predictions. Using 50+ indicators (such as EMA, Bollinger Bands, ...) it produces accurate 11-, 21-, and 63-day forecasts, with transparent reporting on performance, accuracy, and confidence.



Salesforce Integration

Integrate Salesforce to manage the full client lifecycle, from onboarding and compliance to portfolio oversight, while enhancing CRM capabilities with a unified view of client interactions.

This supports more personalized service and targeted upselling.



Portfolio Management System

gAln offers a unified portfolio view with real-time monitoring, performance tracking, and risk analysis. It supports strategy comparison and fast client-ready reporting, while Salesforce integration keeps portfolio and client data aligned.



Agentic AI

Connected to our financial database, users can query complex market data in natural language for instant insights. Agentic AI produces personalized analyses, market reports, tailored guidance, and quarterly summary videos for quick, engaging review.



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
...

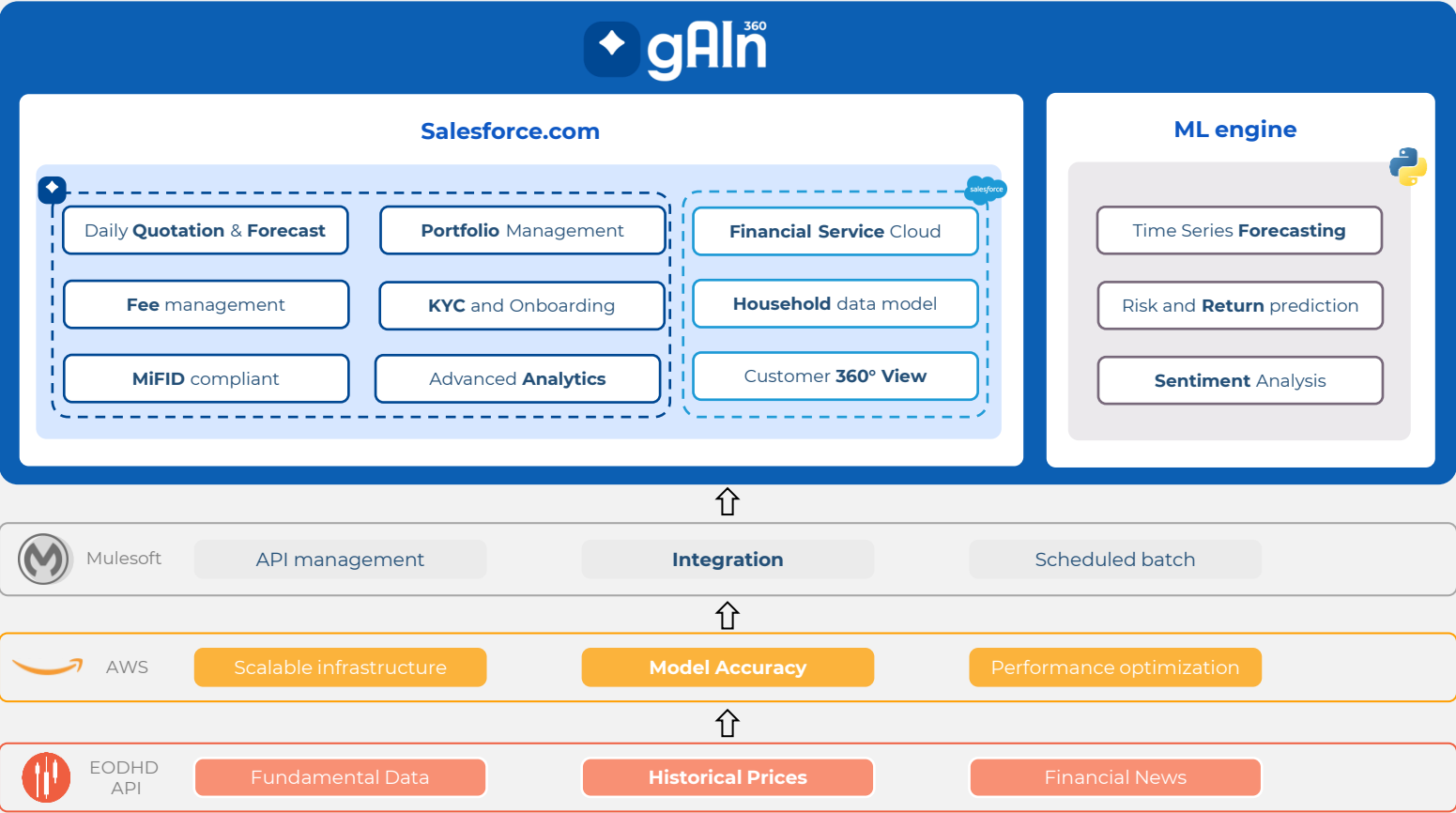


+21 Industries

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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