

OLTAIX™

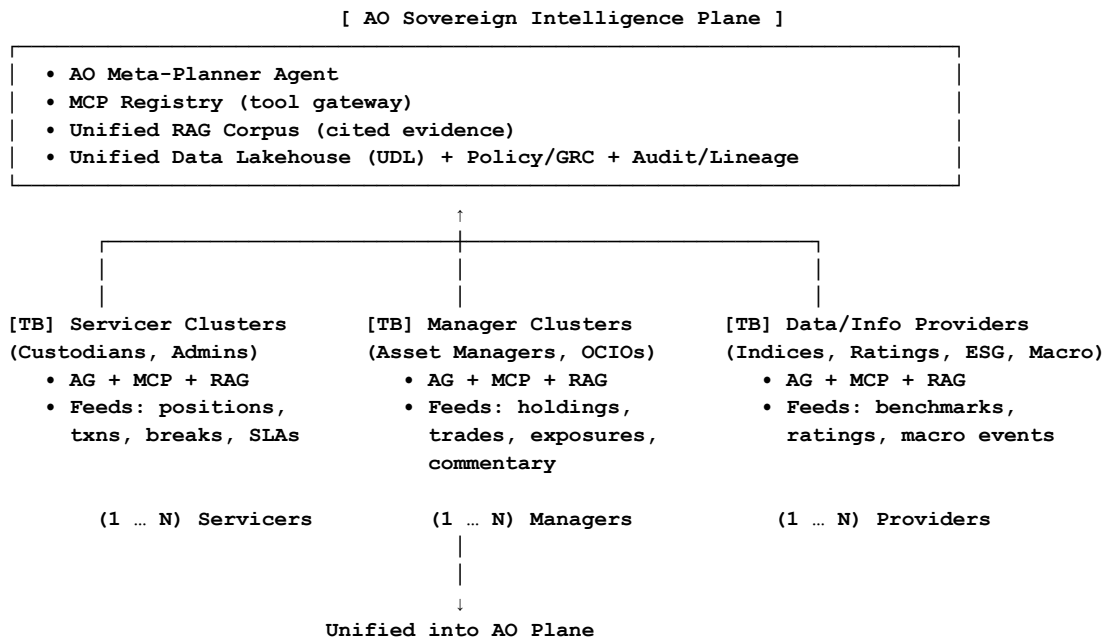
TOPOLOGY BY

ASSET OWNER TYPE

Institutional AI Insights



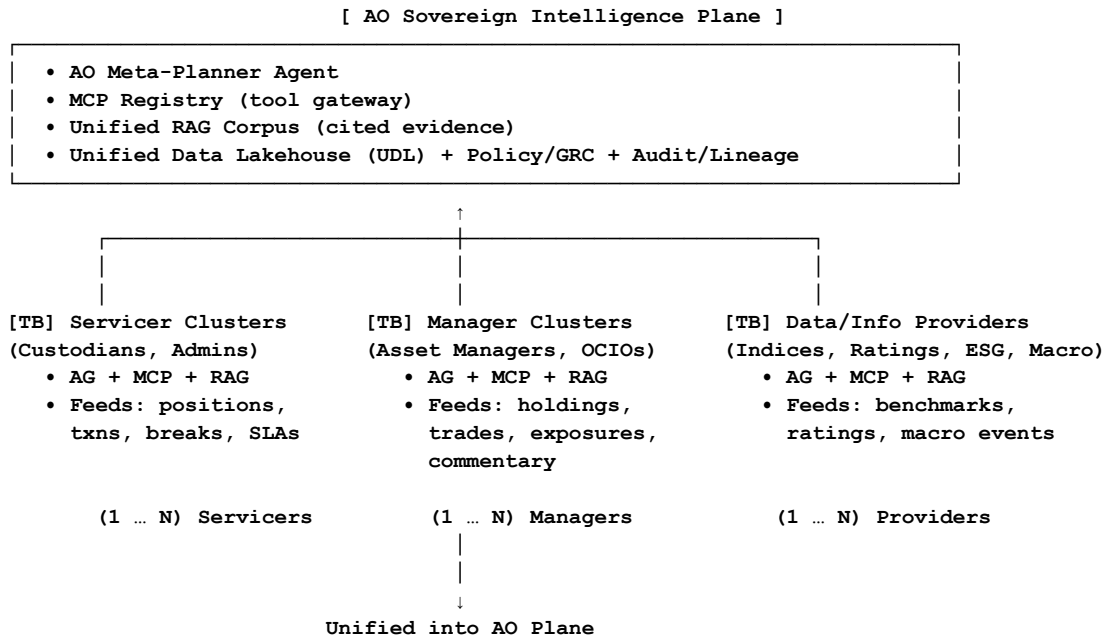
Pension Funds



Special Agents: ALM Agent, Reconciliation Agent, Liquidity Agent, Compliance Agent, Narrative Agent

Focus: Surplus guardrails, liability alignment, regulatory reporting

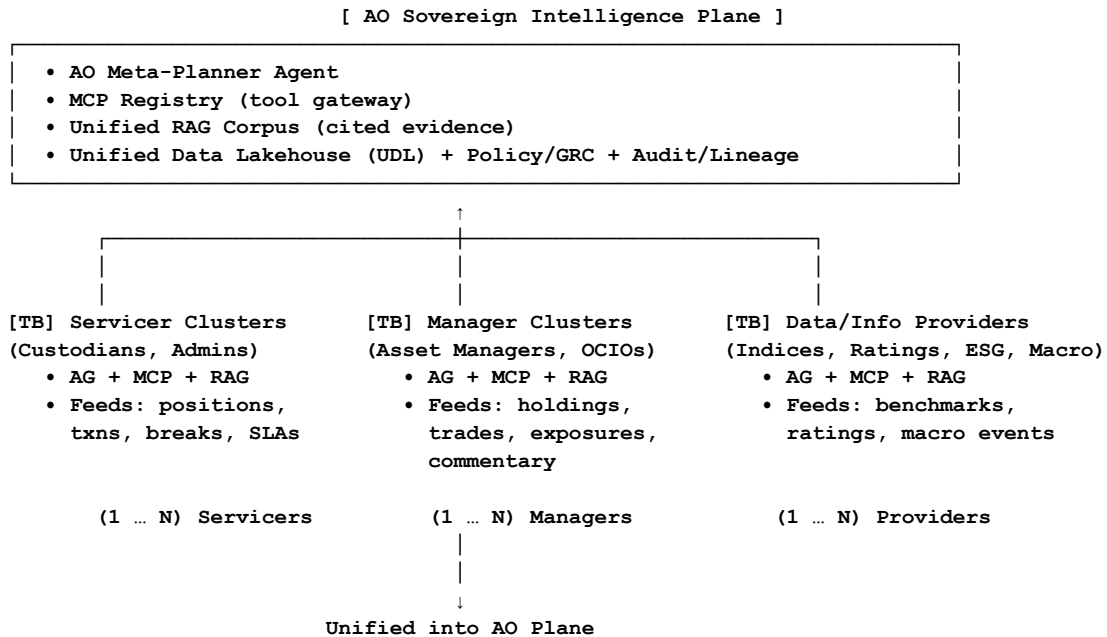
Sovereign Wealth Funds



Special Agents: Macro Agent, Private Markets Agent, National Mandate Agent, Risk Agent, Meta-Planner Agent

Focus: Geopolitical overlays, domestic development, energy transition, sovereign foresight

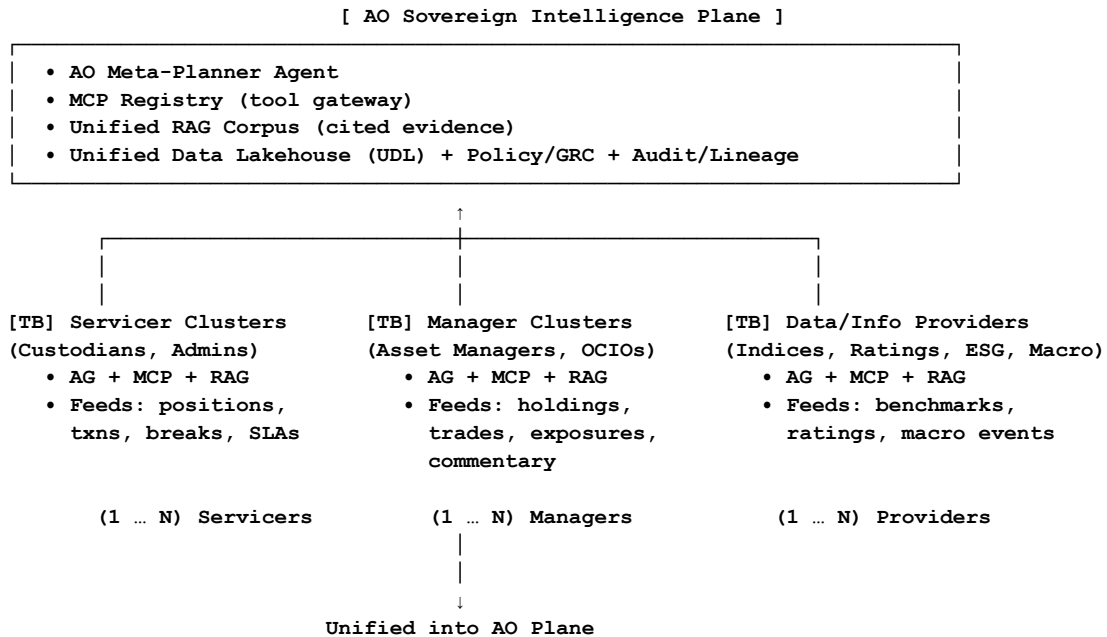
Insurance Companies



Special Agents: ALM Agent, Capital Agent, Credit Agent, Hedging Agent, Narrative Agent

Focus: Solvency/RBC compliance, ALM cashflow matching, private credit valuations, hedging strategies

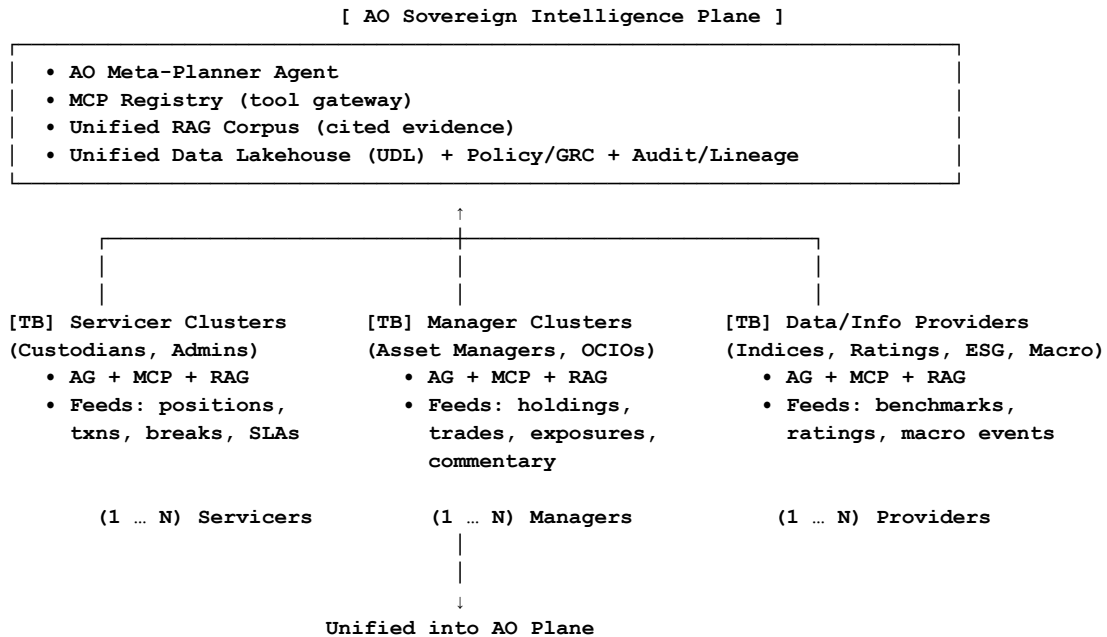
Family Offices



Special Agents: Privacy Agent, Governance Agent, Deal Agent, Impact Agent, Narrative Agent

Focus: Confidentiality, succession governance, co-investments, impact/values alignment

Endowments & Foundations



Special Agents: Stewardship Agent, Spending Agent, Liquidity Agent, ESG Agent, Narrative Agent

Focus: Spending policy optimization, divestment/impact enforcement, donor/trustee reporting

OLTAIX™ — Customized Intelligence for Every Asset Owner

OLTAIX™ is not a one-size-fits-all product. It is a design framework and reference topology that Institutional AI custom-builds for each asset owner — sovereign wealth funds, pensions, insurers, endowments, and family offices.

At its core, OLTAIX provides a consistent sovereign intelligence plane:

- AO Meta-Planner Agent to orchestrate workflows
- Secure MCP Registry for data/tool access
- Unified RAG Corpus for evidence-backed insights
- Unified Data Lakehouse (UDL) with GRC and audit

How OLTAIX™ Is Customized

- By Investor Type: e.g., ALM agents for pensions, macro/geopolitical agents for SWFs, solvency/capital agents for insurers, privacy/governance agents for family offices, stewardship/spending agents for endowments.
- By Partner Ecosystem: Each custodian, manager, and data source operates in its own trust-bounded agent cluster, unified through the AO sovereign plane.
- By Fiduciary Requirements: Governance, compliance, and reporting tailored to the policies, boards, and regulatory frameworks of each client.

Why This Matters

Unlike legacy systems that impose a single platform model, OLTAIX™ ensures:

- Sovereignty: Each asset owner controls its own AI instance.
- Customization: No two OLTAIX deployments are the same.
- Evidence-Backed Foresight: Every action is explainable, auditable, and aligned with fiduciary duty.

Forward-Looking Disclaimer

OLTAIX™ is presented as a design vision and reference topology. Each client deployment will be uniquely designed and customized based on its requirements, partners, and governance needs. OLTAIX is not a pre-packaged product, and functionality, timing, and features are subject to customization and may evolve over time.