



**ALL ASSETS. EVERY DEVICE. UNLIMITED REACH.**

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[www.altavestai.com](http://www.altavestai.com)



# AltaVestAI: Revolutionizing Capital Markets

## The Future of Unified, AI-Powered Investment Management & Banking

AltaVestAI is a next-generation, AI-driven, self-clearing broker-dealer platform that seamlessly bridges traditional and digital assets. By vertically integrating proprietary AI and multi-asset clearing (InteliClear), we eliminate legacy fragmentation, reduce costs, and deliver unparalleled efficiency, compliance, and scalability for institutional, proprietary, and retail markets.

### The Legacy Challenge

Traditional firms grapple with:

**Fragmented Systems** — Relying on multiple vendors for origination, execution, analytics, and settlement.

**Generic AI Risks** — Data leakage and lack of capital markets expertise from off-the-shelf tools.

**Operational Friction** — High fees, manual processes, and delays in multi-asset, cross-border trading.



# Modern Investment Management & Banking Framework

## Layer 1: Front-office

**Multi-Asset Order Entry & Management:** Unified control for diverse asset classes.

**Order Origination & Idea Discovery:** Intelligent sourcing of investment opportunities.

**AI-Enabled Investment Banking Workflow:** Streamlined processes for both **Traditional & Tokenized-assets**.

## Layer 2: Intelligence & Analytics

**Single Name & Portfolio Analytics:** Deep-dive data at every level of the fund.

**AI ROBO Companion:** Real-time automated insights and portfolio assistance.

**Signals & Simulations:** Predictive modeling and market trend analysis.



# Modern Investment Management & Banking Framework

## Layer 3: Connectivity & Oversight

**API/FIX Support:** Unified messaging for chat, order receipt, and routing.

**CAT & CAIS Ready:** Fully compliant with consolidated audit trail requirements.

**AI Compliance Companion:** Automated monitoring and regulatory safeguarding.

## Layer 4: Settlement & Operations

**Multi-Asset Clearing (Powered by InteliClear):** Robust post-trade processing.

**Books and Record Keeping:** Immutable and accurate financial logging.

**Digital Onboarding:** Electronic account opening and automated attestations.



# Our Capital Markets Edge: Tech Debt vs. AltaVestAI

Strategic Pillar	The Legacy "Scramble"	The AltaVestAI Standard
Foundational Risk	Patchwork systems built for yesterday's markets.	<b>Home-grown &amp; optimized for future volatility.</b>
AI Sovereignty	Public AI wrappers; high risk of <b>information leakage</b> .	<b>Proprietary AI; total data isolation &amp; security.</b>
Market Readiness	Reactive deployment; high technical debt.	<b>Years of R&amp;D for institutional-grade stability.</b>
Execution Velocity	API bottlenecks and high-latency order routing.	<b>Super-fast UI &amp; APIs for massive data movement.</b>
Asset Agility	Fragmented codebases; siloed asset classes.	<b>Single, aligned codebase for all asset classes.</b>
Digital Presence	Mobile as an afterthought; low-fidelity apps.	<b>Native, institutional performance on iOS &amp; Android.</b>



# Unified, Secure, Hybrid-Agnostic Infrastructure





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