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Finding an Edge in the Age of AI

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REFLEXIVITY x INTERACTIVE BROKERS · WEBINAR

Finding an edge in the age of AI

Edge has moved from information access to speed of *reliable* synthesis.

May 14, 2026

Reflexivity

Agenda

1

The shift

Why the constraint on performance has moved from access to synthesis.

2

Where edge actually lives now, and how you can own it

The questions you ask, the questions surfaced before you ask, and reasoning on real data.

3

Reflexivity overview

Finding your edge with your new AI analyst: a walkthrough.

4

Live Q&A

Bring your questions for the panel.

PART 01

The shift

The constraint on investment performance has moved from information access to speed of synthesis.

THE QUESTION FOR TODAY

**If access to information is solved,
where does edge come from now?**

The tools are at your disposal.

The frontier has moved

3x

global data created has roughly tripled in size since 2020.*

+40%

qualify lift on knowledge work tasks within AI's capability frontier. **

-19%

accuracy drops when AI is used outside its frontier. **

* IDC Global DataSphere — 64 ZB (2020) → ~180 ZB (2025)

**Harvard / BCG, 758 consultants (Dell'Acqua et al, 2023)

Rich in data. Starved for insights. The new edge is autonomous analysis on real data — not faster search.



Rich in data. Starved for insights.



The constraint on investment performance has changed. Edge has too.

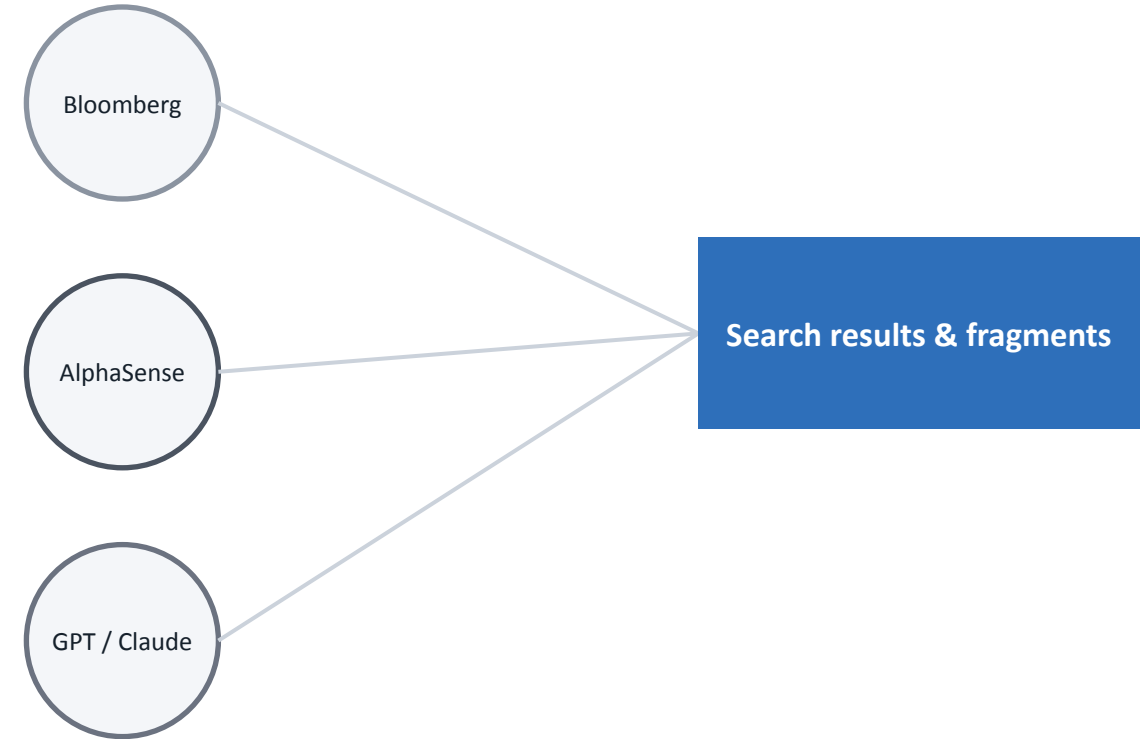
The new bottleneck

Access is solved. Trustworthy, reliable synthesis is still a WIP for many tools.

Markets generate more data than ever. Every investor has access to most of it.

Most tools (terminals, ChatGPT, Claude) still operate as search layers, returning fragments instead of conclusions.

You can spend the whole day wrangling data. The high-value work (framing the question, interpreting the answer) gets whatever time is left.



Today's tools all converge to the same place: search.

Edges to look for: better data, uncover your blind spots, source tracing

1

Reason on real institutional data

GPT and Claude pattern-match on text. They don't compute against trusted market data. Reflexivity writes and executes Python on real data, with full code transparency.

2

Surface what you didn't know to ask

Generic AI waits for a prompt. The catalysts, regime shifts, and second-order exposures that drive returns rarely arrive as a question you've thought to type, but are equally (sometimes more) important.

3

Trace every output to source

When a number matters, it has to be auditable. Search-and-summarize tools blur sources together.

PART 02

Where edge actually lives now

Two places that both require autonomous analysis on real data, not better search.

Edge #1 — Lower the cost of asking

Most hypotheses go untested because asking used to be expensive. Stop overthinking. Start testing.

Drop the cost of asking and behavior changes:

- More hypotheses tested per name, per week
- Coverage extended into the long tail of your universe
- “What would have to be true” becomes a routine prompt, not a project
- Decisions made with more reps, not more hours

BEFORE

“How does Stock X behave when 10Y rates spike 100bps?”

Half a day of analysis. Skip it; move on to the next name.

WITH AN AI ANALYST

Same question. Asked five times across five names.

Answers in seconds, computed against trusted institutional data, with every line traceable to its source.

Edge #2 — The signals you would have missed

Generic AI is reactive. It waits for a prompt.

Most blind spots persist because nothing is watching for them.

A good AI analyst should monitor your universe and intervene when something changes, before you knew to ask:

- Catalysts and earnings implications, in real time
- Regime shifts in factor exposure or correlation structure
- Second-order moves through supply chains and peers
- Anomalies in positioning, flows, and volatility

Earnings implication

TKR pre-announce signals 2H mix shift; peers historically lag 3–5 days.

Supply-chain signal

Tier-2 supplier disclosure flags ~\$140M FY revenue impact for two names you hold.

Regime shift

Factor exposure flipped from value to quality across your watchlist this week.

Catalyst alert

Tomorrow's CPI print: top 3 names in your book most sensitive based on 5y betas.

Reflexivity Insights — illustrative.

Edge #3 — Rely on reasoning, not retrieval, to make 1 and 2 work

Generic AI guesses. Reflexivity computes.

Reflexivity writes and executes Python against trusted institutional data, with full code transparency. Numbers come from arithmetic, not autocomplete.

Built on a financial Knowledge Graph

Companies, people, supply chains, themes, and events linked into one structure. Show how markets respond, not just what was written about them.

Native institutional data

S&P Global, LSEG Datastream, Cboe, Nasdaq, Refinitiv, natively integrated. No separate data contracts. No fragmented tooling. Every output auditable to source.

Fail loudly

When Reflexivity can't answer with confidence, it says so and shows the gap. No second-guessing required.

PART 03

Finding your edge: Reflexivity

Meet your new AI analyst.

Your new AI analyst, purpose-built for investors

Built from the ground up. Not retrofitted.

Reflexivity is an AI analyst, distinct from general-purpose AI, copilots, and chatbots.

Built by capital markets investors, for capital markets investors to think the way an analyst does, not the way a search engine does.

Trusted by asset managers and investors from retail to funds with \$250B+ in combined AUM.

Knowledge graph

A live map of companies, people, supply chains, themes, and catalysts — the structure markets actually move through.

Reasoning, not retrieval

Alfred writes and executes Python against trusted data, with full code transparency. Computed answers, not autocomplete.

Native institutional data

S&P Global, LSEG, Cboe, Nasdaq, Refinitiv — built in. Every output auditable to source.

The analyst's workflow, automated end-to-end

ASK

Alfred

The natural-language interface to the platform. Ask any question across filings, transcripts, news, market data, and the Knowledge Graph, every output computed and cited.

WATCH

Catalyst Insights

Push-based intelligence on events and drivers moving any asset you cover. The unknown unknowns brought to you, in real time.

TEST

Scenario Analysis

Stress-test one name or a whole book against any scenario you describe, historically and forward-looking, with second-order exposures surfaced.

BRIEF

Earnings Summaries

Pre-call prep, post-call recap, and ongoing context around every earnings event in your universe generated, never written from scratch.

Live demo: finding your own edge

01

Start with a watchlist

Pull up an IBKR-style coverage list in seconds.

02

Ask Alfred

“What's the bull case for [ticker], and where does the consensus disagree?”

03

Stress-test the thesis

Run a Scenario: “How does this position behave if oil rallies 15% next quarter?”

04

Set Catalyst alerts

Get alerts the moment the next datapoint that matters lands.

Speaker note: keep the demo to ~6 minutes. Use a real ticker the audience cares about.

What changes when you have an AI analyst on call

TIME

Hours and days → seconds

Multi-step analysis that took an analyst a day runs while you finish your coffee. Reps go up. Latency goes to zero.

VOLUME

Untested theses → routine

When asking is cheap, you ask more. Hypotheses that never made it onto a workstation now get tested as a matter of course.

DEPTH

Out-of-reach → standard

Stress tests, scenarios, second-order exposures across a whole book — not a quarterly project anymore. Standard depth on every name.

CONVICTION

Higher-conviction decisions

Computed, not guessed. Cited, not paraphrased. Auditable, not opaque. The work supports the decision instead of standing in for it.

PART 04

Live Q&A

Drop questions in the chat. We'll take as many as we can in the next 15 minutes.

THANK YOU

Better decisions, made earlier.

Replay & slides

Recording and deck go out via IBKR within 48 hours.

Talk to us

support@reflexivity.com for product questions, upgrades or onboarding.

Discussion starters — in case Q&A needs a nudge

Q1

Where do you draw the line between a search tool and an analyst — and which side does generic AI fall on for you?

Q2

What's a question you'd ask 10x more often if asking were free? Why don't you ask it today?

Q3

Where do you think the next leg of edge comes from — better data, better reasoning, or better surfacing of unknowns?

Q4

For institutional investors: how do you handle the auditability bar when AI is in the workflow?

Q5

For sophisticated individuals: which workflows of an institutional analyst can you now plausibly run yourself?