



# ValuWiki: The Research Layer for Equity Analysts

Organize insights. Power AI. Built for explainability, reuse, and trust.

# The Problem: Research Is Trapped in Documents

## Fragmented Workflows

Even with OneDrive, analysts waste hours re-finding highlights across PDFs, emails, and notes — context remains siloed.

## Vanishing Insights

Critical highlights get lost in old files, leading to missed signals and repeated work.

## Unreliable AI

LLMs hallucinate without traceable data, creating risk in high-stakes financial analysis.

The result: **hours wasted** daily, and **knowledge stuck in silos** and **no instant context** during critical events.

# Solution: Artifacts, Not Just Documents

Each filing, transcript, or note is processed into atomic, AI-ready units — tagged, linked, and citation-anchored. Analysts never lose context again.

## Augment Familiar Workflows

No need to rebuild your process. Integrated access to filings, transcripts, and ready-to-use report templates.

## Semantic Artifacts

Extract entities—companies, people, events, dates—and turn passages into atomic artifacts that can be filtered, tagged, and connected.



# Solution: Key Features



## Visual Knowledge

Reveal non-obvious connections and clusters. Stitch artifacts into story paths.



## AI-Assisted Workflows

Extract summaries, recommend tags, generate notes with full traceability.



## Capture at Point of Insight

Add snapshots and annotations beyond documents into the library.



## Microsoft-Native

Syncs with OneDrive. No file duplication, no vendor lock-in. Works where analysts already work.



# The Network Opportunity: Building the Industry's Information Rails

Beyond individual productivity, ValuWiki creates a connected ecosystem that powers collaboration and trusted knowledge sharing.



"Ultimately, the mission is to build the rails for information flow connecting companies, sell-side analysts, and buy-side analysts in a seamless, hightrust knowledge network."



## From Individual Tool to Industry Platform



### Connected Knowledge

Link insights across firms and analysts while maintaining proper attribution and privacy controls



### Compounding Value

Each piece of research builds on prior work, creating exponentially growing value over time



### Trust & Provenance

Clear sourcing, lineage, and rights management for all information and insights

# Why Now?



## AI Needs Structure

Without traceable context, LLMs can't be trusted for high-stakes financial analysis.



## Equity Research is Ripe

High-value domain with pattern-heavy but unstandardized data. Human + machine collaboration critical.



## Nothing Purpose-Built Exists

Enterprise RMS are CRM-first, not research-first. Generic AI copilots hallucinate without structure.

Analysts expect better tools that just work, with minimal learning curve, and fit how they already work.

# Market Size & Competition

## Market Size

- ~50,000 professional equity analysts globally
- At ~\$100/user/month → ~\$60M/year potential
- Initial focus on independent analysts and small firms with lean purchasing cycles
- Industry Platform: \$2B+ (300,000 + professionals including Corporate finance teams & IR departments, and assuming Network effect pricing & data monetization)

## Competition

<b>Enterprise RMS</b> Verity, Tier1 CRM	Complex, CRM-first, not knowledge-first
<b>Note-Taking Apps</b> Notion, Obsidian, Evernote	Flexible but generic. No finance-ready parsing or tagging
<b>AI Assistants</b> MS CoPilot, NotebookLM, Perplexity, Claude and OpenAI	Powerful but broad
<b>Other AI start-ups</b> hudson-labs.com, tenzingmemo.com, pinegap.ai, stockinsights.ai, among several others.	Disconnected from core analyst workflows

# Product Features

## A Modern Research System for Human and Machine Use

### Integrated Library

Built-in access to 10+ years of filings, transcripts, and press releases. Start with content that matters.

### Knowledge Graph

Visualize connections by system tags, custom tags, and manual links. Craft narrative sequences.

### Entity Extraction

Auto-detects organizations, people, and dates for instant filtering.

### M365-Native

No file duplication. No external cloud. No friction.

### Semantic Search

Finds exact passages across your library in milliseconds — with citations to source documents.

### Tags & Categories

Combine auto-assigned and custom tags to build your own taxonomy.

# Business Model & Go-To-Market

## Subscription

- \$99/user/month
- Free trial for adoption
- Bring Your Own OpenAI Key
- Users pay only for what they use
- Complete privacy and cost control

Why PLG? Leaner GTM with low resources. Analysts prefer trying tools before committing.

## Go-To-Market Strategy

### Product-Led Growth

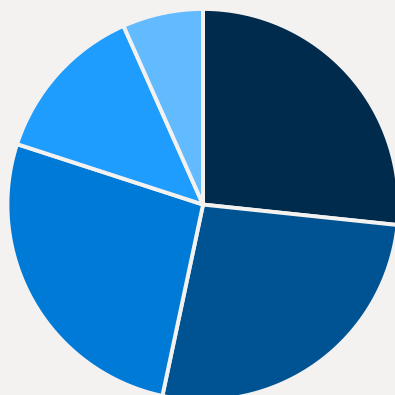
Share structured notes online to generate interest.  
Built-in sharing tools → collaboration → viral pull.

### Community Outreach

Engage analysts where they already live — Twitter, Reddit, email, forums.

# Financial Plan & Roadmap

Pre-Seed Raise Target: ~\$150,000



- Founder salary
- Datafeeds & integrations
- Design & Engineering
- Marketing
- Compliance

## Roadmap



# Team

## Rahul Singh Solanki

8+ years as equity research analyst (JP Morgan, Edelweiss). 7+ years building tech products. Exited Agritech founder. Understands both the problem and how to build solutions. IIT Bombay '09.

## Rishabh Garg

7+ years building tech products at companies like DE Shaw, Amazon and Meta. IIT Jodhpur '18.

# Deep Dive: Our White Paper

## Access the Full Story

For a complete view of our vision for reimagining equity research knowledge systems, download our white paper::

[www.valuwiki.com/white-paper](http://www.valuwiki.com/white-paper)

## Connect With Us

Questions? Feedback? Interested in partnership opportunities?

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