

CENTRL

CentrlX

A FIRST-OF-ITS-KIND AGENTIC AI PLATFORM

Purpose-built for the investment industry

CentrlX enables firms to operationalize AI through a framework of pre-built and custom agents, industry integrations, and enterprise-grade controls. By combining domain-specific intelligence with robust governance, CentrlX empowers organizations to automate complex business processes while maintaining the security, transparency, and compliance required in regulated environments.

CONNECT AGENTS TO TRUSTED INTERNAL & EXTERNAL DATA SOURCES

Connect to the systems you already run on. Securely link approved internal applications — CRM platforms, file libraries, email and calendar — through pre-built, enterprise-grade connectors that preserve your existing permissions and access controls.

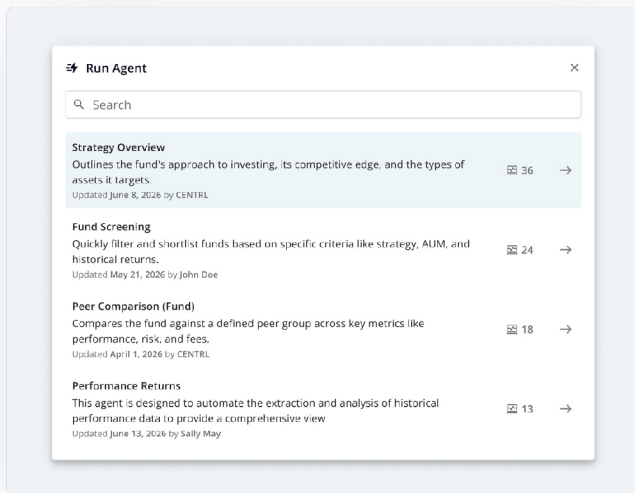
Start with data you already trust. Natively draw on information housed in your CENTRL Diligence and Response modules, so agents work from a single governed source of truth instead of duplicated or stale data.

Go beyond your four walls. Enrich workflows with external intelligence such as Form ADV filings, live web search, and other industry-specific sources for credible, defensible outputs.

Grow your connectivity as you scale. Tap a rapidly expanding connector ecosystem built for investment management firms — new integrations extend what agents do without added engineering lift.



LAUNCH EXPERT-BUILT AGENTS AND BUILD CUSTOM WORKFLOWS



Get up and running in days, not months. Launch from a curated library of pre-built agents and domain-specific skills built for Manager Research and Investor Relations workflows.

Build on real practitioner expertise. Every pre-built agent is designed by CENTRL industry practitioners with decades of experience, so sound methodology is baked in — not generic AI logic.

Make agents speak your firm's language. Tailor terminology, methodology, analysis approach, instructions and preferred outputs so results arrive in the format your team already trusts.

Grow your library your way. Clone pre-built agents as a starting point or build custom agents from scratch, backed by expert guidance to refine them over time.

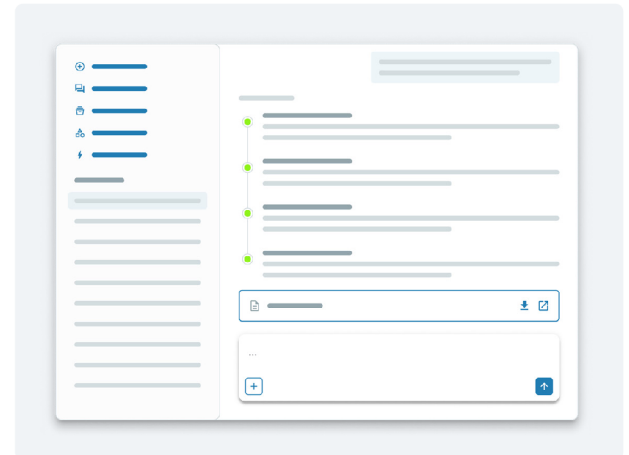
AUTOMATE MULTI-STEP WORKFLOWS WITH HUMAN CONTROL

Deliver work that's ready to present. Produce rich, professional deliverables — reports, documents, slide decks and spreadsheets — polished enough to go straight to a committee or client.

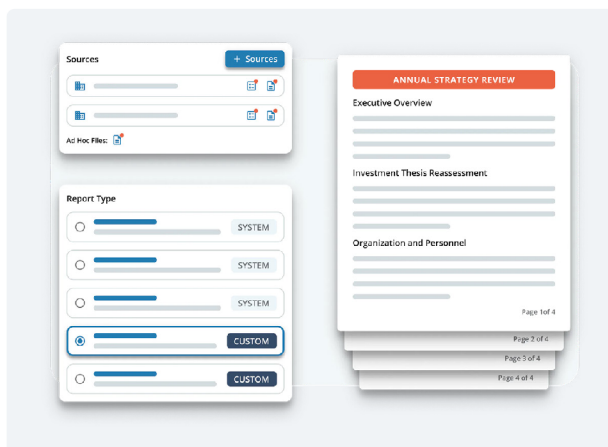
Move work forward, not just information. Take action in connected systems: drafting emails, preparing follow-ups and teeing up record updates, so agents complete tasks rather than surface insights.

Keep a human hand on every decision. People stay in the loop to review, refine and approve outputs before anything is shared, sent or committed.

Know exactly what happened, and why. A rich audit history of actions, approvals, outputs and configuration changes gives compliance and risk teams a defensible record on demand.



EXECUTIVE REPORTING WITH GENERATIVE AI WORKFLOWS



See the full picture in one place. Centralize due diligence data into a single source of truth, so insights draw on complete, consistent information rather than scattered files and spreadsheets.

Turn data into deliverables instantly. Generate polished summaries and reports for committees and clients in moments, freeing analysts to focus on judgment, not formatting.

Catch what matters before it becomes a problem. Detect emerging risks, trends and anomalies in real time, giving teams the lead time to act rather than react.

Make every decision faster and better informed. Consistent, contextual insights across the firm mean speed doesn't come at the expense of rigor.

MANAGE AGENTS WITH A BUILT-IN GOVERNANCE MODEL

Run agents under a single control center. Centrally manage agent creation, configuration, access and deployment with role- and team-based permissions, so oversight scales with your organization.

Decide exactly who can access what. Control which agents, skills and approved data sources users can reach — including real-time chat — so sensitive data stays behind the right guardrails.

Improve governance with real usage data. Monitor usage, feedback and adoption to refine quality and enforce policy, turning oversight into an ongoing feedback loop.

Extend governance beyond CentrIX. Integrate with agent control planes as needed, so oversight stays consistent as your firm's broader AI ecosystem grows.

