

MDOTM Ltd Launches StoryFolio: AI-Powered Portfolio Commentaries for Asset & Wealth Managers

The solution for advisory teams, investment teams & financial advisors generates comments on client portfolios, discretionary mandates, SMAs & model portfolios.

NEW YORK, UNITED STATES, July 23, 2024 /EINPresswire.com/ -- [MDOTM Ltd](https://www.einpresswire.com/press-releases/MDOTM-Ltd), the global provider of AI-driven investment solutions for Banks, Insurance, Asset and Wealth Management companies, launches [StoryFolio](#).



MDOTM Ltd is the global provider of AI-driven investment solutions for Banks, Insurance, Asset and Wealth Management companies.

This new solution is designed for financial advisors and investment teams to generate personalized commentaries on client portfolios, SMAs, discretionary mandates, institutional mandates, and model portfolios.



StoryFolio enables asset and wealth managers to efficiently scale their portfolio reporting and commentary activities, meeting the growing demand for personalized investment experiences.”

Tommaso Migliore, CEO & Co-Founder at MDOTM Ltd

In the face of increasing competition, fee pressures, and regulatory demands, asset and wealth management firms are turning to AI and personalization to drive revenue growth and enhance operational efficiency.

StoryFolio offers this opportunity by delivering tailored commentaries at an individual portfolio level with deep data analytics, therefore supporting investment professionals in enhancing client engagement and

improving sales and distribution efforts.

By combining MDOTM's proprietary [Analytical AI](#) with an innovative Controlled Generative AI layer designed to write financially accurate text, Storyfolio writes human-like portfolio commentaries tailored to each portfolio unique characteristics, asset allocation preferences, and a custom market view defined at both asset class and single-instrument level.

Since its launch, Asset and Wealth Management companies across the US, UK, and the EU have integrated Storyfolio in their advisory and investment teams' processes to provide highly personalized commentaries in a wide range of customizable formats, languages and outputs such as client reports, emails, and factsheets.

Tommaso Migliore, CEO & Co-Founder at MDOTM Ltd commented:



Peter J. Zangari (Partner & Head of Americas, MDOTM Ltd) & Tommaso Migliore (CEO & Co-Founder, MDOTM Ltd)

“StoryFolio enables asset and wealth managers to efficiently scale their portfolio reporting and commentary activities, meeting the growing demand for personalized investment experiences. StoryFolio is ideal for advisory and investment teams seeking to integrate advanced technology in a controlled and effective manner, therefore accelerating portfolio reporting and streamlining the management of model portfolios, SMAs and client portfolios.”

Peter J. Zangari, Partner & Head Of Americas at MDOTM Ltd commented:

“StoryFolio is bringing significant innovation to the traditionally labor-intensive field of portfolio reporting and commentaries, which has so far lacked scalable and personalized solutions. By integrating both Analytical and Controlled Generative AI, StoryFolio is enhancing productivity and client engagement for asset and wealth management firms, providing fully customizable, human-like outputs across various formats, languages, and data analytics options”

About MDOTM Ltd

With offices in New York, London and Milan, MDOTM Ltd is a strategic partner of numerous institutional counterparts to integrate AI into their investment processes. Selected by Google and recognised as one of the best AI companies, it has raised over \$10 million from institutional investors and finance professionals, making it one of the world's largest firms specializing in AI for investments. For more information visit: <https://mdotm.ai>

About Sphere by MDOTM Ltd

Sphere, the AI investment platform from MDOTM Ltd, is utilized by Chief Investment Officers, Portfolio Managers, and Wealth Managers worldwide to enhance investment and asset allocation decisions. The platform offers three core features that can be used independently or in conjunction: AI-driven insights for Strategic and Tactical Asset Allocation, Portfolio construction and rebalancing at scale and Storyfolio to automate reporting and portfolio commentaries through StoryFolio. Learn more about Sphere at: <https://mdotm.ai>

Media MDOTM Ltd

MDOTM Ltd

contact@mdotm.ai

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