EmergeFlow
SMALL DIFFERENCE. LARGE IMPACT.

• CASE STUDY

AI DEAL PLATFORM INVESTMENT BANKING

The AI operating system for investment banking

Built for Analysts, Associates and VPs, the platform unifies AI-driven grid workflows, deal and fund management, and GraphRAG-powered document analysis in one secure environment. A native Model Context Protocol (MCP) server turns it into a fully agentic partner for the deal team, so bankers spend their hours on judgement instead of data handling.

01 CLIENT & NEED

Investment banking teams have to execute deals faster than ever while working through mountains of unstructured data: CIMs, 10-Ks, credit agreements and entire virtual data rooms.

Deal teams were losing hours to **manual extraction**, **page-by-page diligence** and **chasing status** across email threads, trackers and shared drives. The need was one secure workspace that automates the repetitive work and puts an agentic partner alongside every analyst, associate and VP.

THE PLATFORM AT A GLANCE

M1 **AI-powered smart grids** that run custom workflows at row, column or cell level.

M2 **Deal & fund command center** for active deals, funds and portfolios.

M3 **Document intelligence & agentic harness**, backed by GraphRAG and a native MCP server.

GraphRAG | Native MCP server | Agentic AI | Deal management | Smart grids | Due diligence | Knowledge graph

02 BEFORE VS AFTER: THE DEAL LIFECYCLE

STAGE	BEFORE	AFTER
Data extraction & modeling	Analysts spend hours scrubbing PDFs, 10-Ks and CIMs to copy financial metrics into static Excel templates.	Smart grids run custom workflows at row, column or cell level, auto-populating models and running valuation scenarios with no manual entry.
Due diligence & document analysis	Deal teams read thousands of data room pages by hand, risking missed covenants and human error.	The GraphRAG agentic harness synthesizes whole document sets, answers multi-layered queries and extracts clauses with traceable citations.
Deal tracking & project management	Statuses, tasks and files are scattered across email threads, static Excel trackers and separate shared drives.	The command center puts everything on visual Kanban boards, with files and tasks tied directly to the active deal card.
Information retrieval & oversight	VPs wait hours or days for the team to track down portfolio metrics, deal precedents or fund data.	The native MCP server lets the chat agent pull real-time, permissioned data from internal deals and funds in plain language.

03 WHAT WE BUILT

MODULE 1

AI-powered smart grids

A familiar spreadsheet interface with modular AI built in.

Cell-level AI. Attach custom workflows to rows, columns or single cells.

Automated population. Pull financial metrics, scrape targeted data and run valuation multiples without manual entry.

Dynamic modeling. Move between static data and AI-generated predictive scenarios.

MODULE 2

Deal & fund command center

Dedicated spaces for active deals, funds and portfolios.

Visual pipeline. Kanban boards for deal status, diligence progress and task assignments.

Integrated attachments. Pitch decks, CIMs, NDAs and models stored securely on the relevant deal card.

Task orchestration. Assign, track and automate tasks across the deal team.

MODULE 3

Document intelligence & agentic harness

A chat-based extension of the deal team that reasons over complex financial documents.

GraphRAG. Links entities, relationships and financials across thousands of pages.

Native MCP server. Secure, real-time access to deals, funds and portfolios.

Automated diligence. Cross-reference NDAs, extract covenants and summarize CIMs with citation traces.

04 VALUE BY ROLE

- **Analysts.** No more hours of manual data entry, formatting and first-pass document scrubbing. Time goes back to actual financial analysis.
- **Associates.** Faster pipeline management, task delegation and model updates through AI grid workflows.
- **VPs.** Instant, reliable oversight of deal status, fund performance and portfolio health, asked in plain language.

05 ARCHITECTURE & SECURITY

INFRASTRUCTURE

Native MCP server giving AI agents deterministic, permissioned data access.

KNOWLEDGE GRAPH

GraphRAG architecture for grounded, citation-traced document intelligence.

COMPLIANCE

Built for institutional finance, meeting its strict security and data-siloing requirements.

06 RESULTS

In production, the agent took on multi-step deal work end to end. **Autonomous multi-step execution:** it chained research queries, cross-referenced siloed data and populated complex financial models without human intervention. **Adaptive document synthesis:** it parsed unstructured dark data, from legacy PDFs to email threads, to answer intricate due diligence questionnaires. **Tool-use precision:** it reliably orchestrated enterprise software, legacy bridges and spreadsheet APIs, handling messy, non-standard workflows without breaking. **Exception-triggered oversight:** it recognized its own confidence thresholds, executing routine tasks on its own and escalating edge cases and anomalies to human bankers.