FLX
NETWORKS

FLX
ARTIFICIAL
INTELLIGENCE

Introduction & User Guide
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I. FLX AI – AN INTRODUCTION

Welcome to our cutting-edge solution designed to revolutionize how you work with and leverage content. FLX Artificial Intelligence (AI) is an application that you can immediately put to work that will save you and your team time and money. It will help you connect with your clients in a way that you've never done before.

Through FLX AI, we are aggregating both business and investment content into a single location that is tailored to your preferences and allows you to search information that matters to you and how you operate your business. More importantly, leveraging the functionality we outline in this document, you can take that content and you can repurpose it into client and/or internal communications in a matter of seconds. FLX AI will revolutionize how you think about communicating with your partners, with your clients, and with your team.

With our comprehensive content aggregation features, we systematically gather structured and unstructured content from diverse financial services sources, ensuring breadth and depth. Experience unparalleled efficiency as you save time, generate leads and boost results with AI-powered content generation capabilities and fully branded digital newsletters.

Once you have logged into your FLX Launchpad, FLX AI is available via our Solutions Exchange, which can be found by clicking on the Solutions drop down menu on the left-hand side of your screen. **This feature must be enabled based on your membership profile and is available to both Plus and Premium community members**.
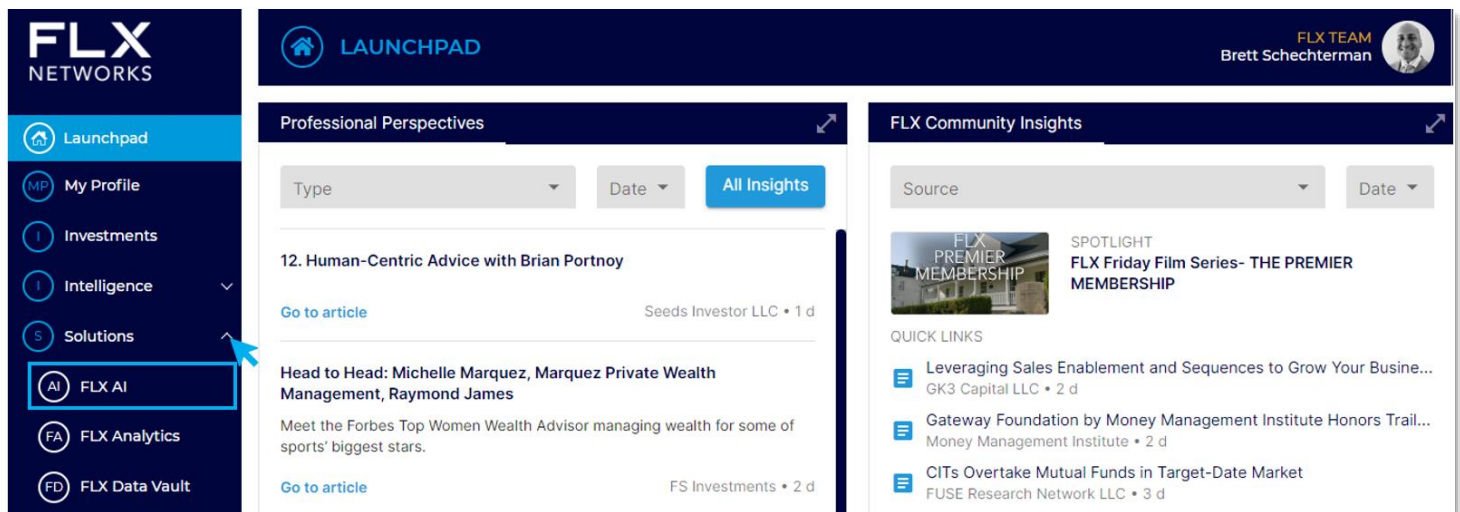
In the following pages, we will outline the navigation and workflow options to ensure you can optimize your experience and your outcomes. Using FLX Artificial Intelligence, with the click of a button, leverage a curated intelligence hub, collecting and summarizing your selected topics, so that you can optimize your time creating internal or client messaging.

Let's get started…

II.   FLX AI WORKBENCH & COMPONENTS

Once you have selected FLX AI, you will arrive at the FLX AI Workbench. Through your curated series of FLX AI channels, interactive filtering options and intuitive workflows, your journey is streamlined through the component windows that drive your output… Channels & Filters, News, AI Summary and Analytics Insights.

Each of these provided components are unique but are functionally interlinked in terms of driving your results.

Channels & Filters: Starting from the upper left, you are presented with a series of channels and filters to set the foundation for your news queue. Channels can be selected one at a time using the radio button, while filters, by either Topic or Source, provide the ability to narrow your search scope.

FILTER BAR & CALENDAR:

As you work with your filter options across the Workbench, your Filter Bar at the top of your screen is what will provide you with transparency as to the current criteria you are leveraging to isolate your news queue.

For instance, if I select 'Private Equity' from my Topics list and and Source 'Pensions & Investments', my Filter Bar will read as follows. The green '+' indicates that I am including these values within my search context. The 'Clear Filter' button will wipe any filters from your search and will default back to your base channel setting.
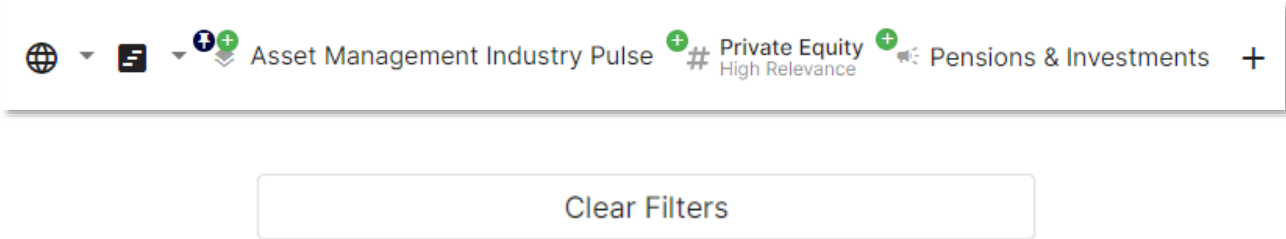
On the upper-right of your screen, you will see the Calendar. This provides the ability to look back to distinct periods in your content search. In addition to specified date ranges, there are canned periods that range from 24hrs, 3 days, 7 days, 30 days, 3 days, to all history available.
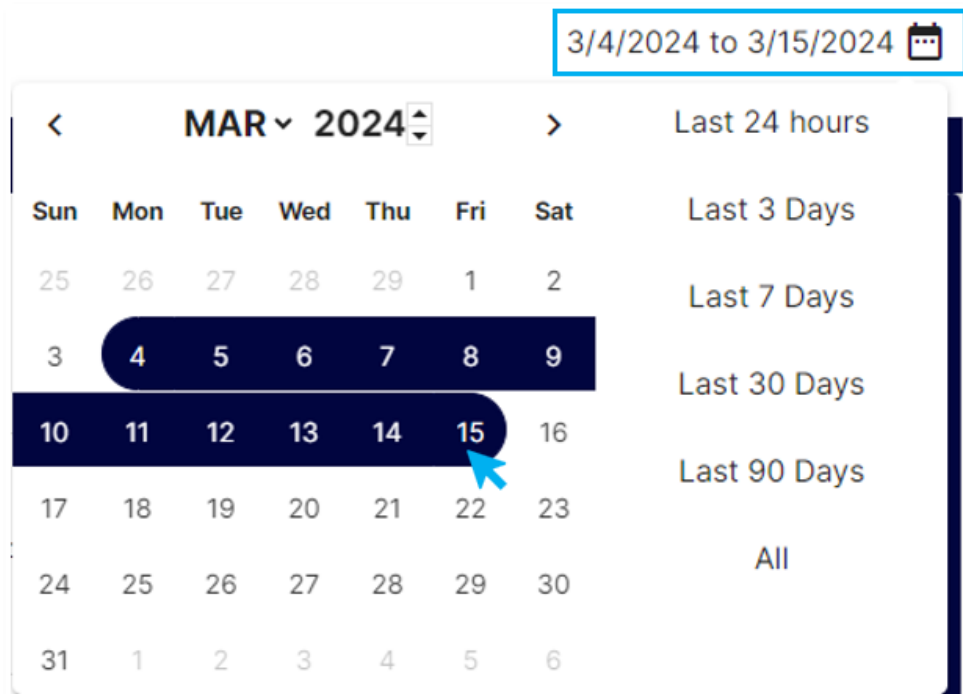
NEWS:

The 'News' window is the actual queue of stories that will serve as the reference for the AI Summary I want to generate.

You can leverage this window canvas to simply scroll through all your articles / documents and/or you can drill down and leverage interactive tagging to drive your filtering criteria as well.
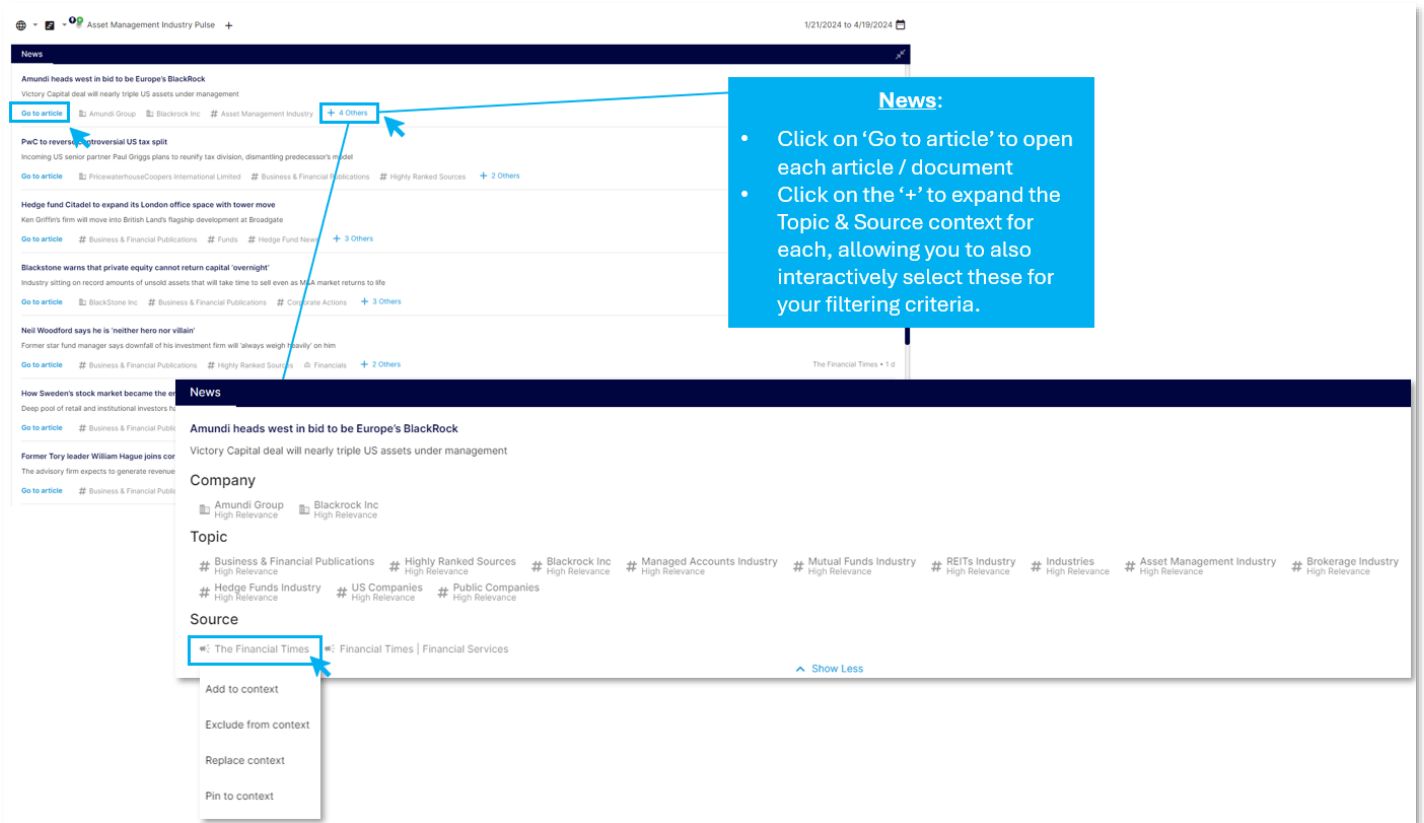
AI SUMMARY:

The is the window you will use to leverage your news content, decide scope and trigger an GenAI response.
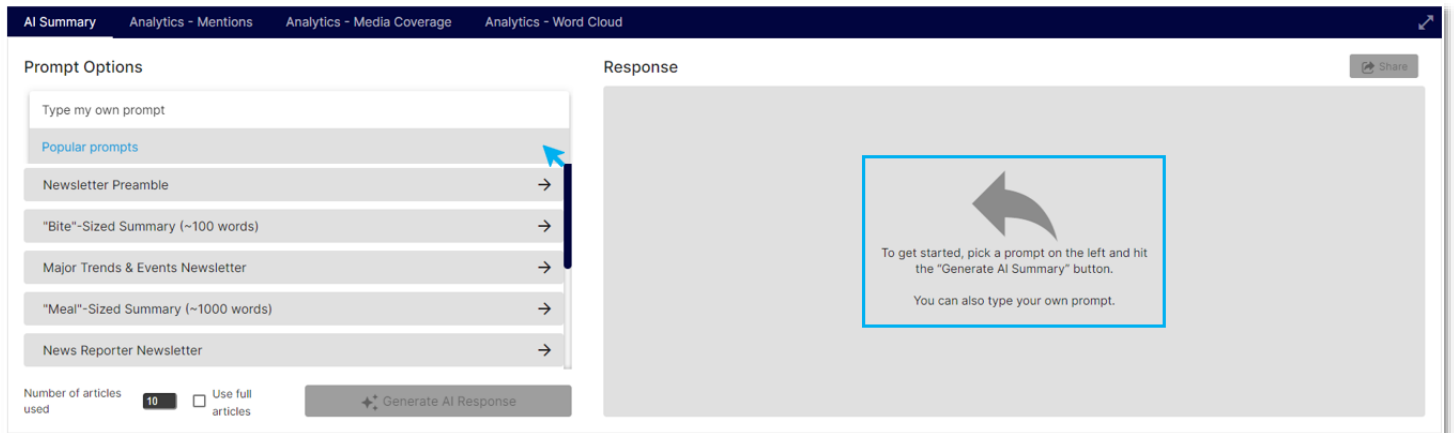
ANALYTICS INSIGHTS:

Analytics - Mentions

Gain comprehensive insights into your channel and filter criteria results across various dimensions including Company, People, Topic, Industry, Source, and Fund. The data presented in this screen provides transparency to all the entities mentioned in the news results, and the number of articles or percentage of your content that mentions each. Interactively select and dynamically add any of the 'mentions' to filter criteria with a simple left mouse click, which will then be visible on the filter bar.

Analytics - Media Coverage

Explore a dynamic time series view within this component, showcasing story volume derived from selected channel sources. Easily filter results by specific date windows, allowing users to focus on spikes in volume or periods of interest for enhanced analysis and insights. If you left click and drag on a particular period, the application will automatically zoom further to that sub-period. You also have the ability to refer back to your calendar at the upper right to dynamically adjust the time series query results.

Analytics - Word Cloud

Unlock valuable insights from your curated channel content with the Word Cloud feature, which visually represents word frequency and importance derived from the story inventory. By condensing complex information into this easily digestible visualization, users can quickly identify trends, patterns, and key themes, facilitating informed decision-making and actionable insights.

III.   WORKFLOWS

Now that each of the component windows has been outlined, let us step through the interactive workflows.

Window Navigation

As we have delivered similar capabilities to the Launchpad, each of the individual sub-windows within the FLX AI workbench can be re-sized to facilitate navigation and/or drill-down inquiries. This feature can be helpful as users look to:

- select additional filters within 'Topic' and 'Source'

- review News results based on channel, date window and filter settings

- engage the analytics tabs across 'Mentions', the 'Media Coverage' timeline or the 'Word Cloud'

Window Expansion / Contraction:
- By clicking the dual-sided arrow, users have the ability to expand each to a full screen view in order to facilitate deeper dives on any of the filtering criteria, resulting content or content analytics.

Window Re-sizing:
- By clicking the dual-sided arrow, users have the ability to dynamically extend or contract the individual windows by dragging the borders accordingly.

Example: Resizing window to expand capability to view 'Topics' and 'Sources'

Left Click & Drag

Example: Expanding window to full view to review 'News' results based on all channel and filters settings applied.

Left Click Upper Right Corner

Selecting Channels & Assigning Filters

Users are granted access to curated channels that are centrally managed on their behalf by the FLX Team. With a simple toggle of the radio button, channels dynamically switch, and are visible in the filter bar at the top of your window. Once a channel is selected, users can delve deeper by expanding the menu to apply additional filters by 'Topic' and/or 'Source'. The 'Clear Filter' button stands ready to swiftly revert back to default channel results, ensuring effortless exploration.

Filters can also be applied interactively as you navigate the news results and the sub-sequent Analytics modules highlighted in the sub-sequent visuals. Per the screenshot below, when you left-click a tag (#) that is associated with a story, the drop-down menu is presented that providers the following options:

- **Add to context**: include topic with filter criteria (indicated with **green +**)

- **Exclude from context**: exclude topic with filter criteria (indicated with **red -**)

- **Replace context**: topic fully replaces any of the existing filter criteria

- **Pin to context**: preserves that topic so it will not be replaced either when the user selects 'Clear Filters' or 'Replace Context'

AI Response Generation

Prompt Selection & Article Scope Settings

Streamline your workflows with pre-canned prompts, ensuring consistent communication and saving time on repetitive tasks. Otherwise, tailor messages to your specific needs and engaging your audience by typing your own prompt.

Canned prompts: Offer streamlined workflows by providing standardized communication, reducing the need for repetitive manual input and ensuring consistency across interactions.

Personal prompts: On the other hand, personalized prompts offer flexibility, allowing users to tailor messages to specific contexts or recipients, enhancing engagement and adaptability in diverse communication scenarios.

FLX AI Popular (Pre-Canned) Prompts:

• Summary
• Newsletter Preamble
• Major Trends & Events Newsletter
• News Reporter Newsletter
• Succinct Newsletter
• "Meal"-Sized Summary (~1000 words)
• "Snack"-Sized Summary (~300 words)
• "Bite"-Sized Summary (~100 words)

Simply follow these steps: decide your prompt criteria, specify the number of articles with the up / down arrows (looking back starting with the most recent at the top of your 'News' queue), choose 'Use full articles' if there are attachments included/associated with the story, click 'Generate AI Response'.

Note: When selecting the 'use full articles' option, there is a processing threshold that will be triggered if the content is too large. If that is the case, you will see the following message in your Response box.

If this occurs, you typically have two options to consider:

1) You can choose fewer stories to ensure the model can fully capture and process the digitized documents / attachments

2) You can toggle off the 'Use full articles' and only utilize the content provided the body of the link to produce your response rather than the associated documents / attachments.

Share / Copy

Once you are satisfied with your response output, simply share drop into your branded marketing templates using the 'Share → Copy' function.
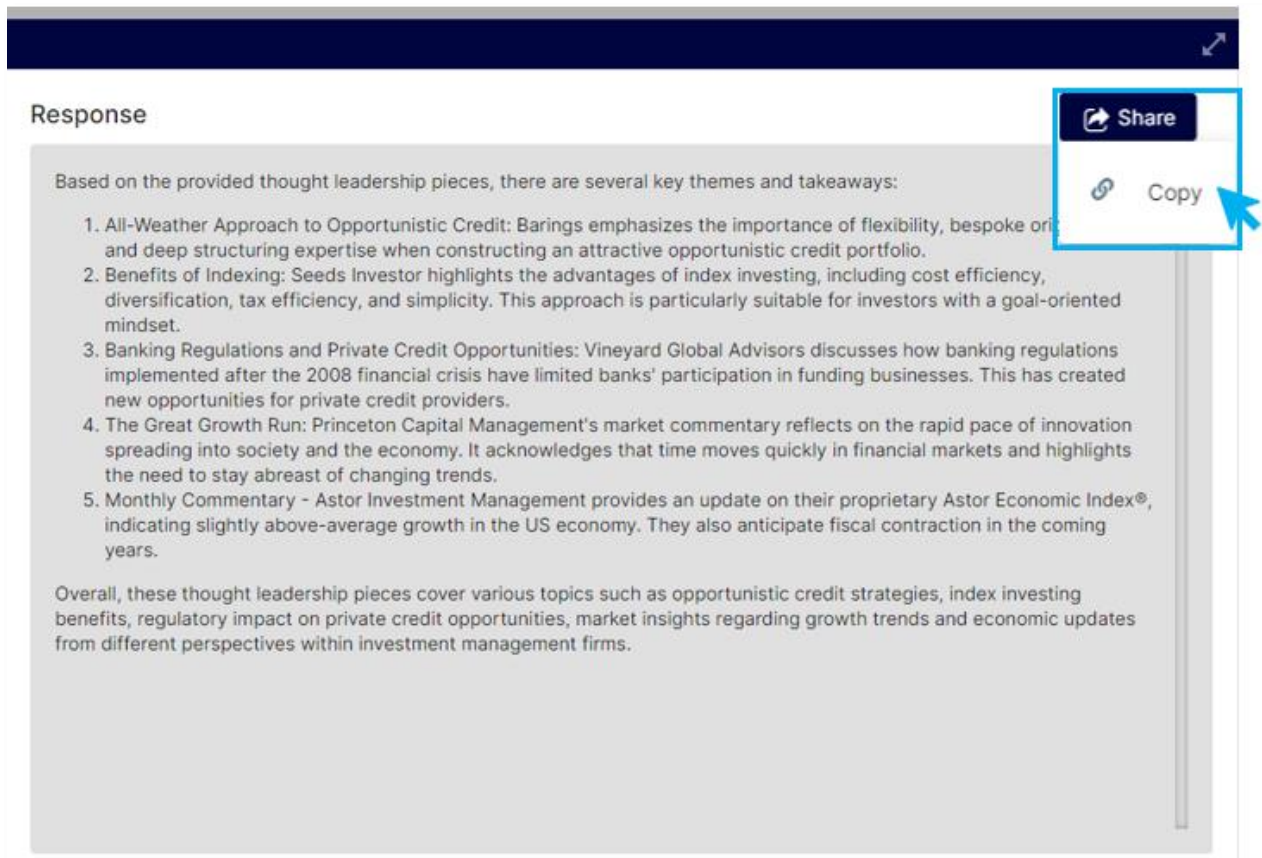
IV.   FLX AI CHANNEL CURATION CONTEXT

FLX AI systematically collects structured and unstructured content with both breadth and depth from a wide array of diversified financial services sources particularly relevant to asset and wealth management. The content is ingested via company websites, leading news outlets, research providers and multi-media channels. A rich and flexible content taxonomy structure empowers FLX to customize your experience with personalized, curated intelligence "channels" both within the FLX Application and to leverage for your digital campaign or internal messaging initiatives. To highlight the breadth, we have provided the current aggregated composition of two sample channels below.