

**FLX**  
NETWORKS



# Introduction & User Guide

## April 2024



# CONTENTS

## I. Introduction

## II. AI Workbench Components

### Channels & Filters

### Filter Bar & Calendar

### News

### AI Summary

### Analytics Insights: Mentions, Media Coverage, Word Cloud

## III. Workflows

### Window Navigation

### Selecting Channels & Assigning Filters

### AI Response Generation

## IV. Channel Curation Context

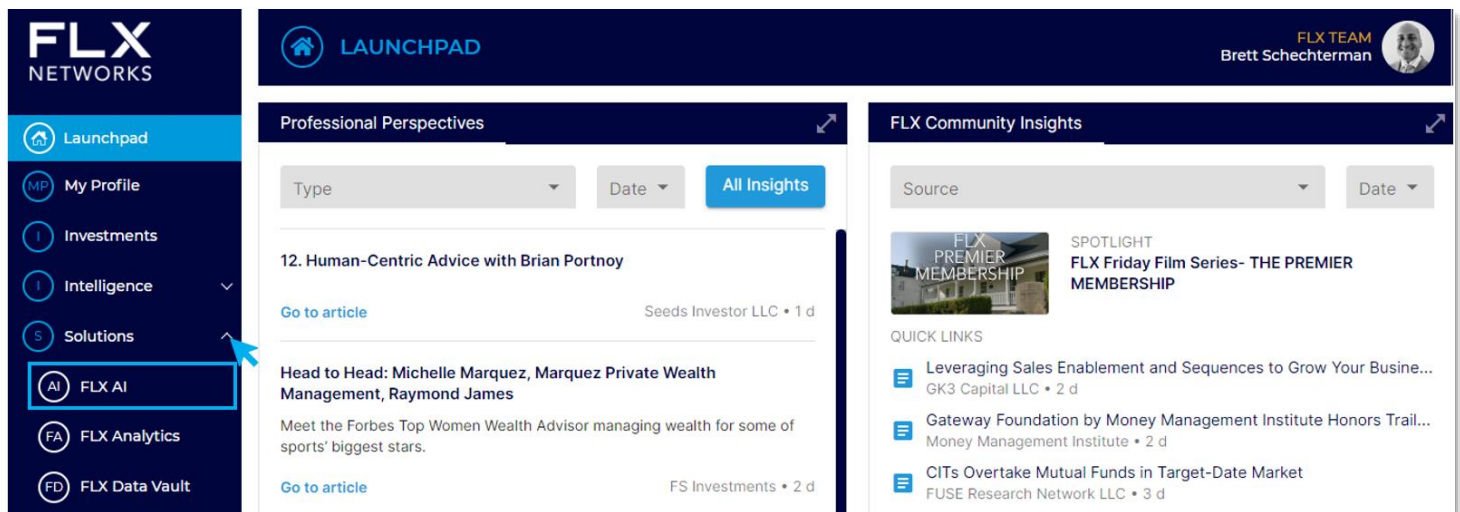
## I. FLX AI – AN INTRODUCTION

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.

**Channels:**

- Set of curated channels that have been pre-configured by FLX on your behalf
- Set the foundation for the 'News' window on the right hand side of your Workbench.

Channels

- Advisor Corner
- Asset Management Industry Pulse
- CEF Nexus News & Insights
- FLX | Active Managers - Insights
- FLX | Active Managers - News
- FLX | Community Insights
- Leading Asset Manager Insights

Topic

Source

- The Financial Times 25.1%
- Financial Times | Financial Services 25.1%
- Institutional Investor 24.5%
- Pensions & Investments 22.1%
- Asset TV 19.2%
- Asset TV | Latest 14%
- Institutional Investor | Home 8.6%

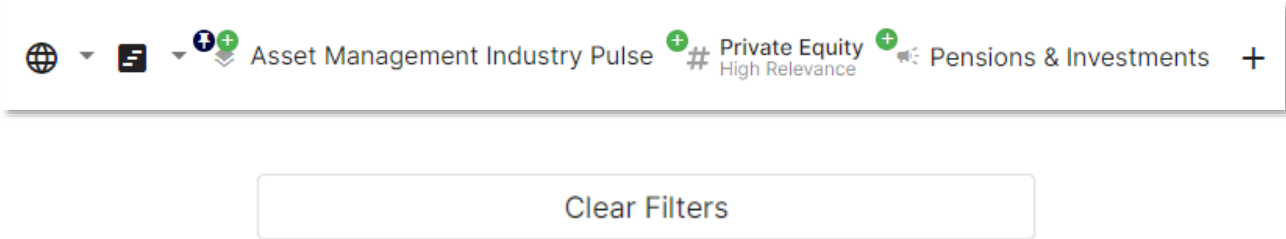
**Filters:**

- Drop-down values are dynamically populated based on the channel and time-period selected
- Upon expansion, values are ranked based on % of content with which they are relevant

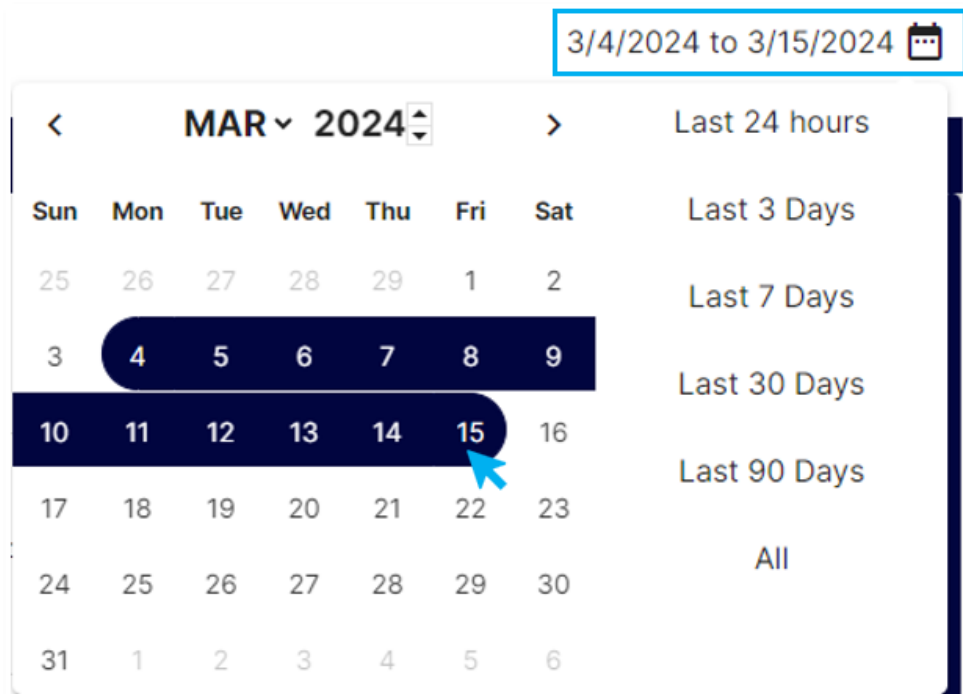
**FILTER BAR & CALENDAR:**

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.



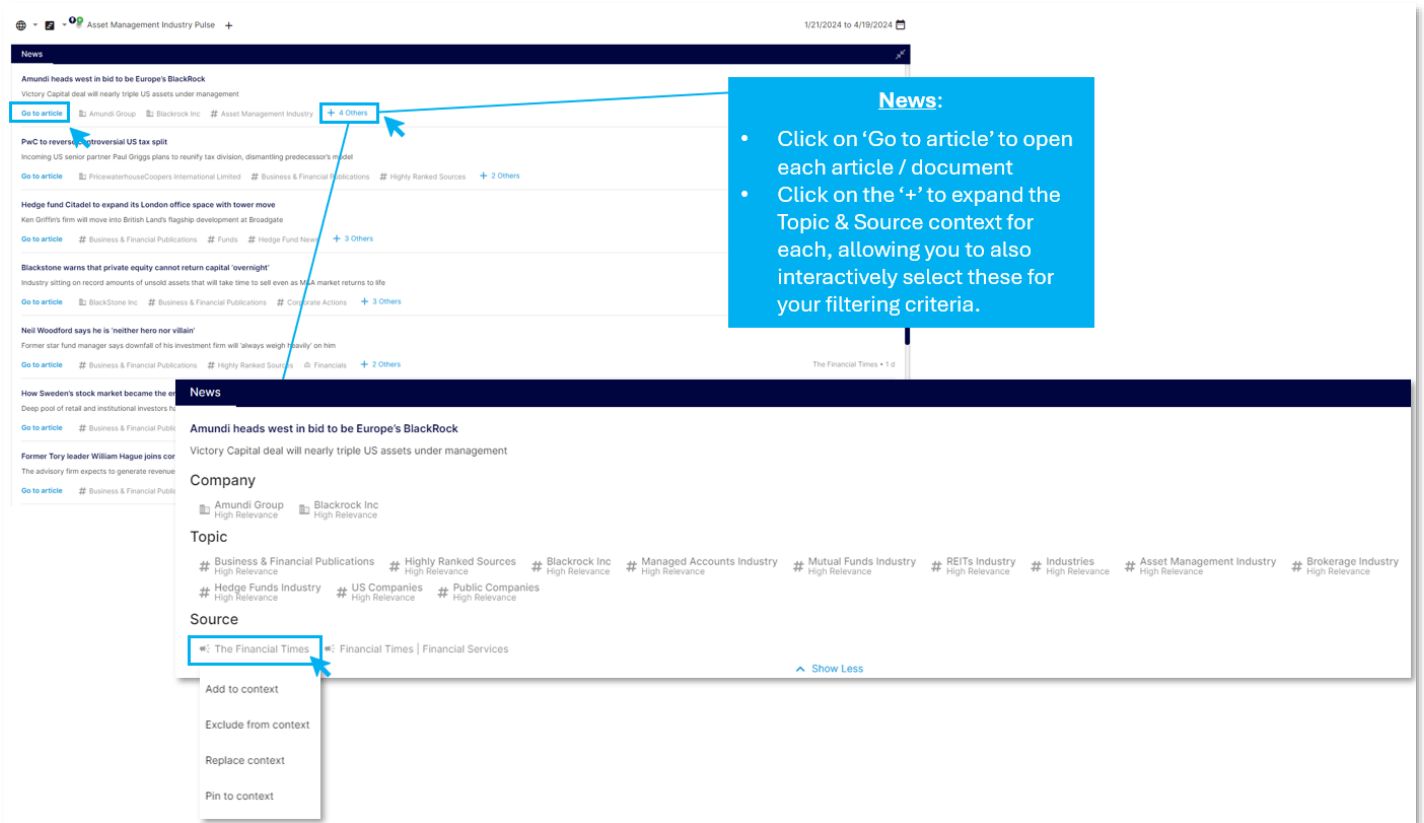
On the upper-right of your screen, you will see the Calendar. This provides the ability to look back to distinct periods in your content search. In addition to specified date ranges, there are canned periods that range from 24hrs, 3 days, 7 days, 30 days, 3 days, to all history available.



## NEWS:

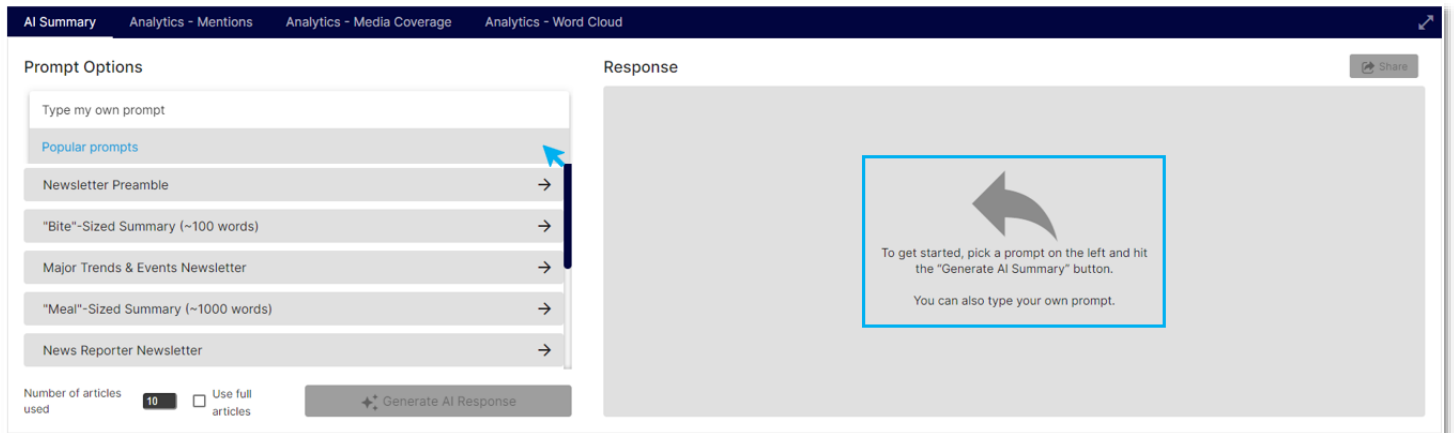
The 'News' window is the actual queue of stories that will serve as the reference for the AI Summary I want to generate.

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:

This 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 - Mentions:**

- Users are provided full transparency of the results of their channel / filter criteria across the following domains:
  - Company
  - People
  - Topic
  - Industry
  - Source
  - Fund (as/if relevant)
- Any line-item listed and interactively selected with the left mouse click will be dynamically added to the filter criteria as well (will be visible on the top bar)

Company	Total	% Documents
Advisorpedia   RIS Media Works LLC	334	11.9%
Morgan Stanley	123	4.4%
Blackrock Inc	84	3.0%
Wells Fargo & Co	73	2.6%
Bank of America Corp	71	2.5%
Goldman Sachs Group Inc	70	2.5%
Raymond James Financial Inc	68	2.4%
LPL Financial Holdings Inc	63	2.2%
JPMorgan Chase & Co	59	2.1%
Charles Schwab Corp	58	2.1%
NVIDIA Corp	52	1.9%
Investnet Inc	51	1.8%
Merrill Lynch Pierce Fenner & Smith Inc	51	1.8%
Bank of America Private Bank	47	1.7%
Capital Network Inc	47	1.7%
Dynasty Financial Partners Inc	39	1.4%
Amazon.Com Inc	36	1.3%

Page 1 Next >

**Pagination:** View the content to the most granular level by simply navigating page by page.

### 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 - Media Coverage:**

- This component provides a time series view of story volume based on the sources included within the channel selected
- Users have the ability to filter results based on specific date windows (based on spikes in volume or a period of interest)

## 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.

**Analytics – Word Cloud:**

- Visually represents word frequency and importance
- Left-clicking on individual words will add each to the Filter Bar as a text search.

## 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’



🌐 📄 🔍 🏠 Markets Hub +

**Window Expansion / Contraction:**

📅 Start date - End date 📅

Channels and Filters

**Channels**

- Advisor Corner
- CEF Nexus News & Insights
- FLX | Active Managers - Insights
- FLX | Active Managers - News
- FLX | Community Insights
- Markets Hub
- Politics Hub

**Topic**

**Source**

Clear Filters

News

**Take some profits and buy cyclical names if March CPI only matches expectations, investors say**

Now may be the time to peel back some winning stocks and boost positions in losing sectors, according to at least two Wall Street investors.

[Go to article](#) # Earnings News # Earnings News # Earnings Surprise + 38 Others CNBC • 51 m

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**S&P 500 Rises Ahead of Inflation Data**

[Go to article](#) # Business & Financial Publications # Equity Indices # Highly Ranked Sources + 2 Others The Wall Street Journal • 58 m

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**A crucial report Wednesday is expected to show little progress against inflation**

The March consumer price index is expected to register increases of 0.3% both for the all-items measure as well as core.

[Go to article](#) # Central Banks # Economic Data # Economics + 18 Others CNBC • 1 h

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**Delta Air Lines Reports Earnings Wednesday. Why the Stock Can Keep Outperforming.**

AI Summary Analytics - Mentions Analytics - Media Coverage Analytics - Word Cloud

Prompt Options

**Summary** →

**Newsletter Preamble** →

**Major Trends & Events Newsletter** →

**News Reporter Newsletter** →

**Succinct Newsletter** →

Number of articles used 10  Use full articles ➕ Generate AI Response

**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.

To get started, pick a prompt on the left and hit the "Generate AI Summary" button.

You can also type your own prompt.

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

🌐 📄 🔍 🏠 Markets Hub +

**Left Click & Drag**

Channels and Filters

**Channels** ↓

**Topic** ↓

**Source** ↑

- The Wall Street Journal 48.1%
- WSJ.com | Finance & Markets 48.1%
- Barron's 20.5%
- Barron's | Markets 20.5%
- BNN Bloomberg 11.6%
- CNBC 10.1%
- CNBC | Investing News 8.8%
- BNN Bloomberg | Economics 7%
- Morningstar 5.6%
- BNN Bloomberg | Investing 4.6%
- Morningstar | Research and Commentary 3.8%
- Visual Capitalist | Latest Updates 2.4%
- Visual Capitalist 2.4%
- Morningstar | Stock Analyst Notes 1.3%
- CNBC | Economy 1.2%
- Marcus Lu 1%
- Ignites | Most Popular Issues 0.9%

Clear Filters

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

🌐 📄 🔍 🏠 Markets Hub +

**Left Click Upper Right Corner**

📅 1/12/2024 to 4/10/2024 📅

Channels and Filters

**Channels** ↓

**Topic** ↓

**Source** ↑

News

**Ranked: The World's Top Flight Routes, by Revenue**

In this graphic, we show the highest earning flight routes globally as air travel continued to rebound in 2023. The post Ranked: The World's Top Flight Routes, by Revenue appeared first on Visual Capitalist.

[Go to article](#) # Company & Industry # Professional Industry Publications # Consumer Discretionary + 5 Others Visual Capitalist • 2 h

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**Fitch Cuts China's Outlook as Fiscal Strain Starts to Bite**

[Go to article](#) # Bond & Loan Ratings # Bond Loan Ratings # Bond Rating Changes + 2 Others The Wall Street Journal • 2 h

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**As Palestinians Tickle Back to Khan Younis, They Find Destruction**

[Go to article](#) # Business & Financial Publications # Highly Ranked Sources # News + 2 Others The Wall Street Journal • 2 h

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**Bird Flu Isn't Killing Cows. Experts Are Still Worried.**

[Go to article](#) # Business & Financial Publications # Human Infection # News + 2 Others Barron's • 5 h

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**The Latest Fed Minutes Will Shed Light on Rate and Balance Sheet Plans**

[Go to article](#) # Business & Financial Publications # Central Banks # Economic Data + 2 Others Barron's • 5 h

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**How American Drones Failed to Turn the Tide in Ukraine**

[Go to article](#) # Business & Financial Publications # Drones # Highly Ranked Sources + 2 Others The Wall Street Journal • 6 h

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**A Lucrative Second Act for Military Vets Can Be Deadly**

[Go to article](#) # Business & Financial Publications # Highly Ranked Sources # News + 2 Others The Wall Street Journal • 6 h

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**Ranked: Semiconductor Companies by Industry Revenue Share**

Nvidia is coming for Intel's crown. Samsung is losing ground. AI is transforming the space. We break down revenue for semiconductor companies. The post Ranked: Semiconductor Companies by Industry Revenue Share appeared first on Visual Capitalist.

2

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## 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.

**Channels & Filters:**

- Based on user group assignments, users will have access to a list of content channels that have been specifically curated. By toggling the radio button, the channel will change dynamically and you will see this above in the 'Filter Bar' above.
- Once the channel is selected, users can expand the subsequent menus below to leverage additional filters by 'Topic' and/or 'Source'.
- The 'Clear Filter' button also allows users to revert back to the default channel results.

**Channel Selection:**

- As you toggle / select the channel options in your menu via the radio button, you will see the channel "name" populated at the top of your screen, the section referred to as the 'Filter Bar'.

**Calendar:**

- Via the interactive calendar at the top right of the workbench, users have the option to specify a date range or can simply select one of the pre-defined historical time windows as listed above.

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 provides 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'

**Interactive Filtering Criteria:**

- Users have the ability to utilize the drop-down menus to filter results and they can also dynamically leverage the tags applied at the story level to apply additional filtering content.

The screenshot shows a news feed with articles like "The 3 Most Undervalued Fintech Stocks to Buy in April 2024" and "ChatGPT's Projections Point to Bitcoin Soaring to \$0.00001". A "Channels and Filters" sidebar on the left allows users to select channels like "FLX | ETFs" and "Artificial Intelligence". A context menu is shown over the "Artificial Intelligence" tag with options: "Add to context", "Exclude from context", "Replace context", and "Pin to 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)

The screenshot shows the "Prompt Options" menu with a "Prompt Mode" dropdown set to "Popular prompts". The menu lists several options: Summary, Newsletter Preamble, Major Trends & Events Newsletter, News Reporter Newsletter, Succinct Newsletter, "Meal"-Sized Summary (~1000 words), "Snack"-Sized Summary (~300 words), and "Bite"-Sized Summary (~100 words). Below the list are checkboxes for "Number of articles used" (set to 6) and "Use full articles", and a "Generate AI Response" button.

A second screenshot below shows the "Prompt Mode" set to "Type my own prompt", with a text input field for the user's custom prompt.

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'.

**Generate Response Steps:**

- 1) Decide on your prompt criteria (selected 'Type my own prompt' in this case)
- 2) Specify the number of articles to reference in the queue.
- 3) Decide whether to 'use full articles' in the case of attached documents
- 4) Click 'Generate AI Response'
- 5) Once the response is generated, users have the share option using the 'Copy' function

AI Summary
Analytics - Mentions
Analytics - Media Coverage

**Prompt Options**

Prompt Mode  
Type my own prompt

Prompt  
What are the key themes and takeaways from these through leadership pieces?

Number of articles used

Use full articles

✦ 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.

Response Share

Something went wrong

This model's maximum context length is 16385. However, your messages resulted in 16981 tokens (15957 in the messages, 1024 in the completion) tokens. Please reduce the length of the messages.

Try reducing the number of articles you're sending, or use a larger model.

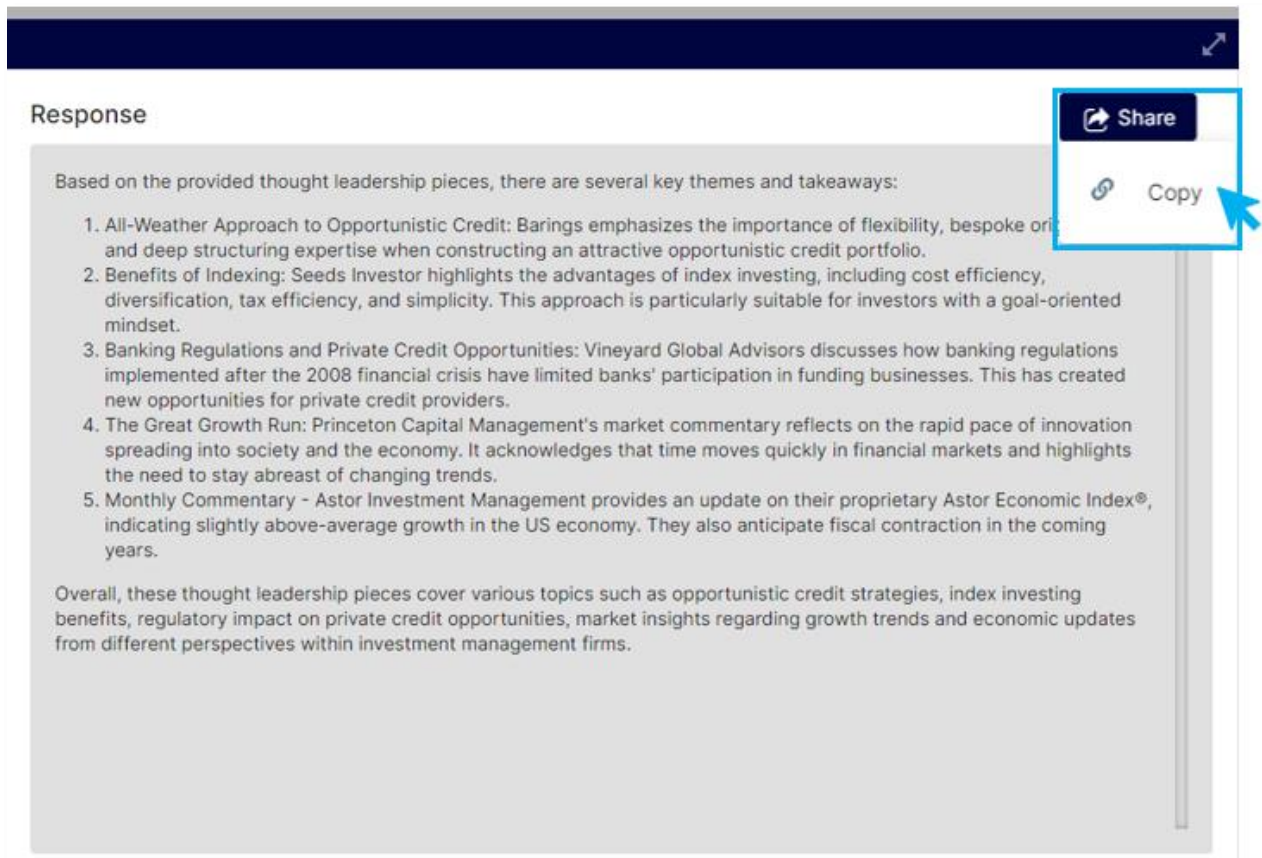
If this occurs, you typically have two options to consider:

- 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.

