

Agentic AI for Investment Banking

Your AI is only as smart as the data behind it.

The banks that fix the foundation win more mandates.

Deal Engine unifies your CRM, deal history, and live market signals into one intelligence layer your team can actually trust — so coverage bankers pitch with conviction, not caveats, and mandates land faster.

Why now

Three forces are reshaping mid-market IB economics – and why the data layer wins the next cycle of mandates

Fees are compressing

Clients expect more coverage, more buyers, and sharper pitches – for less. Associates can't scale the work manually.

Junior talent is leaving

The traditional analyst model is breaking. Firms need leverage that doesn't depend on 80-hour weeks.

Hallucinations put mandates at risk

Generic AI on messy firm data invents buyers, misreads ownership, and cites dead contacts. In an IB pitch, one hallucinated fact means a lost mandate, a damaged client relationship, and potentially a regulatory issue.

How it fits your stack

Deal Engine is the data infrastructure layer. Everything else plugs into it.



Commercial Impact

What mid-market banks measure – and where Deal Engine moves the number

2x

Buyer & investor coverage

~2x more credible counterparties per mandate than traditional analyst research – fewer lost pitches on coverage gaps.

3 weeks → 4 hours

Time-to-pitch-ready list

Three weeks of associate work compressed into half a day – first in the room, with a sharper story.

~1 FTE/seat

Associate-equivalent leverage

Throughput of a full associate per seat – without the ramp, attrition risk, or burnout.

In their words

How Cavendish replaced three weeks of analyst work with four hours

“An associate spent three weeks putting together a buyer list. An agentic stack did the same work in four hours – and surfaced more than double the credible buyers, including investors we would have missed. It's like having a team of associates working for you every day of the week. I would not go back.”

John Farrugia, CEO, Cavendish

What your team will use it for

Six workflows, one intelligence layer

Mandate origination

Surface opportunities before a mandate is awarded.

Buyer & investor ID

Scored and ranked against each client's specific criteria.

Pre-meeting intelligence

Auto-generated briefs from your internal knowledge and live data.

CRM & relationship health

Enriched contact data and proximity scores, always current.

Sector & market monitoring

Real-time alerts on M&A, financing rounds, distressed situations.

Institutional memory

Every deal and relationship becomes a searchable firm asset.

Built for PE. Now deployed by the banks advising them

We learned how your buyers think – because we built for them first.

Deal Engine is the intelligence layer trusted by leading PE firms across Europe and the US. When you're building a buyer list, you're using the same data signals the buy-side already uses to evaluate targets.

18 firms live · 25+ native data connectors · 45M+ datapoints in a typical deployment

Cavendish

Bridgepoint

VITRUVIAN PARTNERS

BOWMARK CAPITAL

inflexion

astorg.

SILVERSMITH CAPITAL PARTNERS

& Ampersand

FINTOP

Two ways to keep this conversation moving

No demo script. Pick the path that fits the conversation you want to have with your senior team.

30-min executive briefing

A working session with our founder for your MDs and group heads. What's working for comparable mid-market advisors – and answers to the questions your team is already asking.

Custom ROI model for your firm

Share a few inputs (team size, mandates/year, avg. fee) and we'll return a tailored ROI model you can bring into your own business case.