



Orbit Insight

An Artificially Intelligent Investment Tool



Orbit Insight

Surfacing data buried beneath traditional internet searches and pages

Orbit insight is the latest iteration of an AI tool originally developed in 2016 in response to an investment need identified by Orbit Financial Technology, in conjunction with fund managers Chris Ford and Tim Day.

The platform surfaces companies that are at the forefront of AI technology and whose economic performance is most directly linked with AI themes, using information that can be buried beneath traditional internet searches and website pages. This is our unique advantage.

It ensures both the **Sanlam Global Artificial Intelligence Fund** and **Sanlam Asia Pacific Artificial Intelligence Fund** only provide exposure to those companies most likely to benefit from AI integration and alignment. Companies that could be overlooked or unknown to the wider market.

It is using and analysing **qualitative** data that gives the platform its edge.

The platform does this by utilising Artificial Intelligence (AI), Machine Learning (ML), Optical Character Recognition (OCR) and Natural Language Processing (NLP) to collate, process, screen and refine unstructured data; predominantly qualitative information from regulatory exchange websites, company websites, news outlets and other sources.

Coupled with traditional detailed fundamental analysis by the investment team, this allows the Funds to deliver greater resilience than funds that invest in narrower themes such as automation or robotics.



Orbit Insight Process



1

Collate data

Orbit scours websites looking for publicly listed companies in both developed and emerging markets. Qualitative, unstructured data in multiple formats and languages is downloaded and stored in a data warehouse.

Over 32 terabytes of data is stored (that's over 32,000 gigabytes).



2

Process and curate

The data is then broken down into its grammatically component parts in order to understand the meaning behind the text using a Natural Language Processing (NLP) model.

This includes processes such as Optical Character Recognition (OCR), sentence split, table recognition and tokenization.



3

Screen

Orbit searches the data for qualities and activities in themes associated with the five stages of Artificial Intelligence: Sensing, Data, High Powered Computing (HPC), Algorithm, and Application. This results in a universe of over **15,000** companies that engage in AI on some level, with companies scoring higher for greater consistency and penetration of AI in their business.

- Concepts range from broad terms such as "AI" to more nuanced like "Neural Networks" and are continually refined to ensure leading technologies are included in the search.
- Terms are translated from 10+ languages of logographical (e.g. Mandarin) and alphabetical (e.g. French) origin.
- Searches are limited to official company documents filed with regulators to ensure the integrity of their involvement in AI.



4

Refine

The list of companies is reduced to around **1,500** by focusing on those companies whose economic performance is most intrinsically aligned with AI and have a minimum level of AI concentration in the business.

The investment team then go on to actively analyse, assess and construct a diversified portfolio of select companies (c.35-40) as detailed in the investment process.

Contact us

Bruce Simpson

Head of Distribution

+44 (0)20 3316 4064

bruce.simpson@sanlam.co.uk

Gideon Nell

Head of Sales – EMEA & FIG

+44 (0)7825 501195 / +351919808000

gideonn@sanlaminvestments.com

Ben Hall

Account Director

+44 (0)7919 576354

ben.hall@sanlam.co.uk

Tom Conquest

Head of Sales, UK Wholesale

+44 (0)7739 321851

tom.conquest@sanlam.co.uk

Andy Groves

Account Director

+44 (0)7917 580592

andrew.groves@sanlam.co.uk

Important information

Sanlam Global Artificial Intelligence Fund risks

The Fund may invest in shares of companies listed on stock exchanges in the United Kingdom, and outside the United Kingdom, exchange rate fluctuations may cause the value of investments to go down as well as up. Investing in companies based in emerging markets may involve additional risks due to greater political, economic, regulatory risks, among other factors.

Sanlam Asia Pacific Artificial Intelligence Fund risks

The Fund invests mainly in equities (e.g. shares) and equity related securities of companies based in Asia Pacific region therefore the value of the investments will be vulnerable to sentiment in that market. Exchange rate fluctuations may cause the value of investments to go down as well as up. Investing in companies based in emerging markets may involve additional risks due to greater political, economic, regulatory risks, among other factors.

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