



AI in Investing

What's Useful Now, What's Becoming Commoditised,
and What It Means for Analysts and PMs

*A practical discussion on AI adoption, workflow change,
and where the edge may move next.*

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What's Becoming Commoditised









Some research tasks are losing scarcity quickly – especially repetitive, text-heavy work.

- Company initiation notes and primers
- Earnings transcript analysis and summaries
- News digestion and event monitoring
- Routine peer comparison summaries
- First-pass note and memo drafting

If these become standard, where does the edge move?

Which Tasks Improve Fastest?

AI compresses tasks before it replaces professions. The key variable is how easy the output is to verify.

Task	Verifiability	AI Progress
Transcript summarisation	High	
Extracting estimate changes	High	
Drafting company primers	High	
Screening / monitoring	Medium	
Model update support	Medium	
Debate / challenge support	Medium	
Variant perception	Low	
Position sizing / timing	Low	

The right question is not ‘Will AI replace investors?’ but ‘Which investor tasks are easiest to verify?’

Coding Moved First. Is Investing Next?

Why Coding Moved First

- Tasks are digital and text-based
- Output is testable — code runs or it doesn't
- Work is decomposable into small units
- Fast feedback loops
- Large public training data

Where Investing Is Similar

- Many tasks are text-based
- Summarisation is verifiable
- Workflows can be decomposed
- Structured data is available
- Repetitive prep is compressible

Where Investing Is Different

- Outcomes are delayed and noisy
- Judgment is hard to evaluate
- Proprietary context matters
- Trust threshold is very high
- Incentives reward alpha, not speed

Investing may not be next in full — but parts of the workflow clearly are.

What Teams Should Do Next

The right next step is not ‘more AI.’ It is one grounded workflow redesign.

1

Identify

Pick one high-value, repeatable workflow

2

Connect

Integrate the right data sources

3

Build

Make workflow repeatable and structured

4

Evaluate

Assess output quality vs. clear standard

5

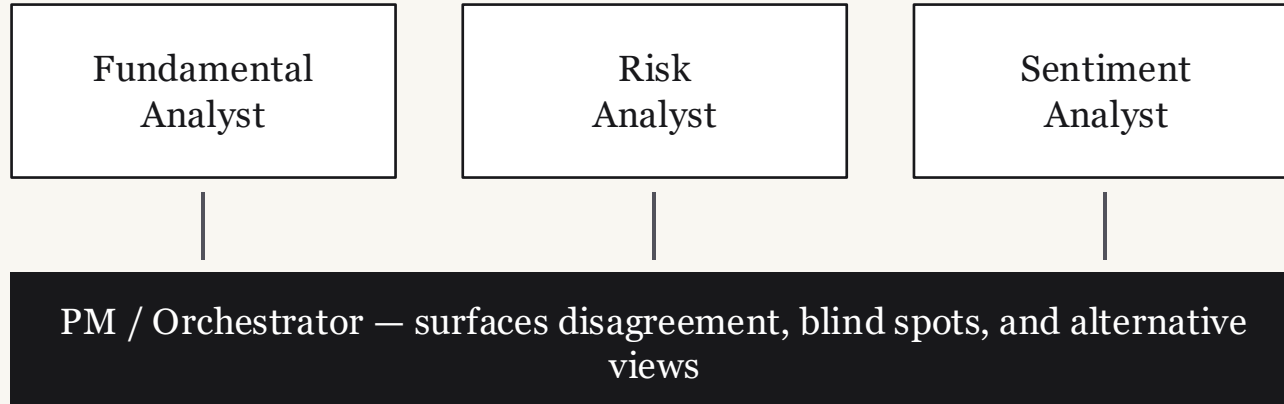
Own

Assign clear ownership and iterate

The near-term opportunity is not replacing investors — it is redesigning workflows so teams can spend more time on judgment, challenge, and portfolio decisions.

One Frontier Example: Multi-Agent Workflows

AI gets more interesting when it behaves like a workflow, not just a chatbot.



The value may not be in the answers, but in surfacing the right disagreements.



Case Studies: Institutional Investors Moving Beyond Experimentation

Some leading organisations are moving from casual prompting to embedded AI workflows.

Norges Bank IM × Claude

- public signal of serious engagement with Anthropic / Claude
- large long-only institution taking AI workflow adoption seriously
- suggests frontier model providers are becoming relevant to major institutional investors
- reported efficiency gains across investment workflows

Balyasny × OpenAI

- close partnership with OpenAI
- designed around feedback loops to iterate quickly
- centralised Applied AI team with a federated deployment model
- ~95% of investment teams actively use the AI platform

Source: [OpenAI case study](#), Balyasny Asset Management, March 2026.. [Claude for Financial Services](#), Jul 2025.

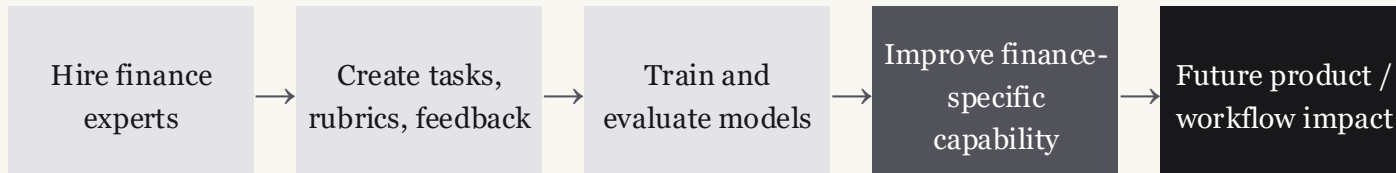
The frontier is moving from individual usage to embedded workflow systems.

What AI Labs Are Hiring For Is a Predictor of What's Coming

Recent finance-focused AI training roles at [Mercor.com](https://www.mercor.com) suggest growing demand for:

- domain-specific reasoning
- finance-task evaluation
- model and deal-workflow review
- better benchmarks for real-world financial tasks

How it works:



Before a workflow is productised, it is often being trained and evaluated. Hiring is one of the clearest signals.

What's Coming: From Chat to Agentic Computer Use

The next step is not just better answers. It is AI that can operate across the computer UI.

What is changing

- from chat windows to working environments
- from one-off prompts to multistep task execution
- from content generation to workflow execution

Examples of the shift

- OpenClaw
- Manus My Computer
- Claude Desktop / Cowork

Why it matters for investment teams

- proactive monitoring and work
- ability to do more through computer use, beyond APIs

The shift is from answering to doing.



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