

# Generali Asset Management AI Journey

Presentation to BSc in Artificial Intelligence



*November 4<sup>th</sup> 2024*

# Agenda

01. Introduction
02. AI and Asset management: an outlook on the next years
03. Key ingredients for a successful AI transformation
04. Governance
05. AI academy
06. GenAM AI use case

# Generali Asset Management

European investment specialist with a global outlook

- We have extensive listed and private markets investment expertise backed by a solid heritage built through our history of managing assets for the Generali Group and external clients.
- Our offering includes a diversified range of active funds across fixed income, equity, multi-asset and quantitative strategies, as well as bespoke mandates and solutions for institutional investors.
- Our LDI solutions leverage on our broad, multi-dimensional capabilities, combined with local regulatory and accounting expertise.
- Our direct and indirect private assets strategies provide clients the opportunity to invest alongside Generali Group, a cornerstone investor for many of these funds.
- We also offer sound expertise in asset manager selection available through a wide fund of funds range.
- Our investment expertise is underpinned by extensive proprietary macro, credit, equity and ESG research resources.

## WHAT WE OFFER TO OUR INVESTORS:

Liability-Driven Investing

Fixed Income

Equities

Asset Allocation Products

Direct / Indirect  
Private Debt and Private Equity

Macro, Credit, Equity and ESG  
research



AuM  
€ 437.3 bn



Established  
1998



Professionals  
476



Offices  
Milan, Trieste, Rome, Frankfurt,  
Cologne, Paris, Madrid



\*Full name: Generali Asset Management S.p.A. Società di gestione del risparmio. Source: Generali Asset Management S.p.A. Società di gestione del risparmio ("Generali AM") as of end Q1 2024. Kindly note that on 1 January 2024, Generali Investments Partners S.p.A. Società di gestione del risparmio has been merged by incorporation into Generali Insurance Asset Management S.p.A. Società di gestione del risparmio, changing its name to Generali AM. Source of ESG award: November 2023, <https://www.eticanews.it/salone-sri-2023-assegnati-gli-esg-identity-awards-i-primi-riconoscimenti-alla-sostenibilita-della-sgr/> a website of ETICAnews. **Past performance provides no guarantee for the future. No express or implied liability or guarantee is assumed that the future performance will correspond to the performance described above.**

# The next years will be pivotal for AI and Innovation competitiveness

## Market & industry trends

**MACROECONOMIC TRENDS**

**EVOLVING CUSTOMER NEEDS**

**NEW TECHNOLOGIES (DATA & AI)**

## Asset manager and asset owners will invest on AI and tech in general in the next three years <sup>1</sup>

**AI**

**56%**

**Predictive analytics**

**51%**

**Cloud computing**

**41%**

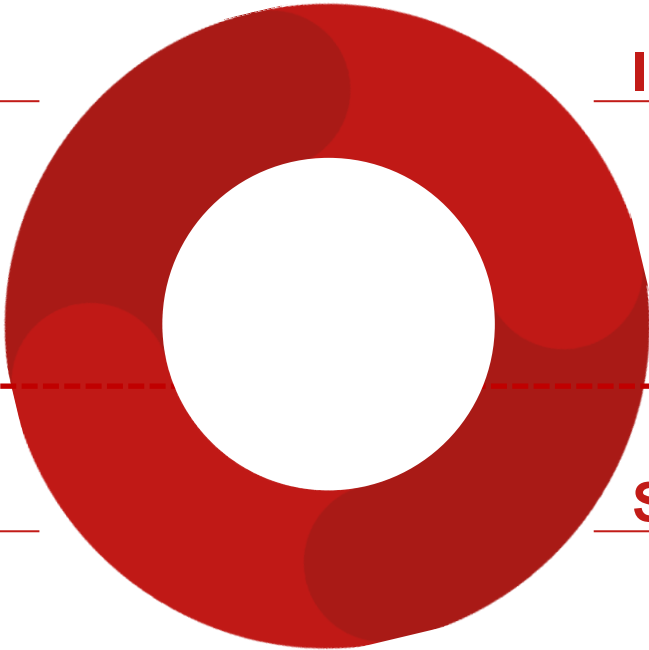
*AI has emerged for asset managers as a lever to increase productivity and serve clients*

# Five key ingredients to adopt AI at scale ...



**DATA**

**INVESTMENTS**



**GOVERNANCE**

**STRATEGY**



**TALENT**



*Focus in the next slides*

Generative AI solutions are developed by following a structured approach and co-designed with the business to achieve concrete results

ILLUSTRATIVE

**BUSINESS IDEA**



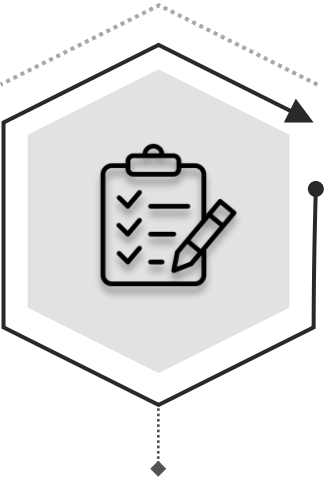
**DEVELOPMENT PHASE**



**SOLUTION TESTING**



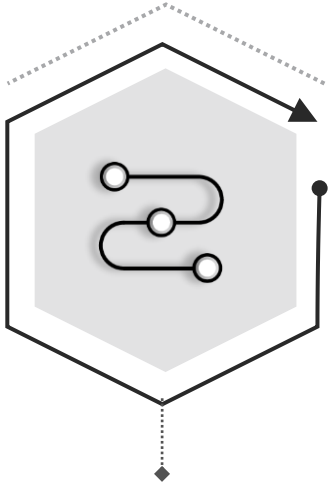
**SOLUTION DESIGN**



**PROMPTING DESIGN**



**ADOPTION!**



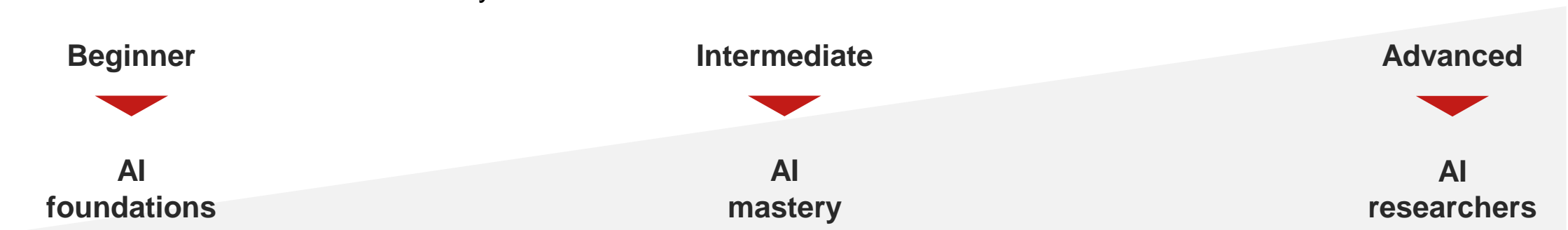
# Drive a cultural change amongst employees of Generali Investments .. and establishing an “A.I. Academy” to upskill our competencies

## Why are we doing the “A.I. Financial Machine Learning Academy”?

Creation of an **educational accelerator** to train a **generation of investment specialists** with new skills in AI & Financial Machine Learning:

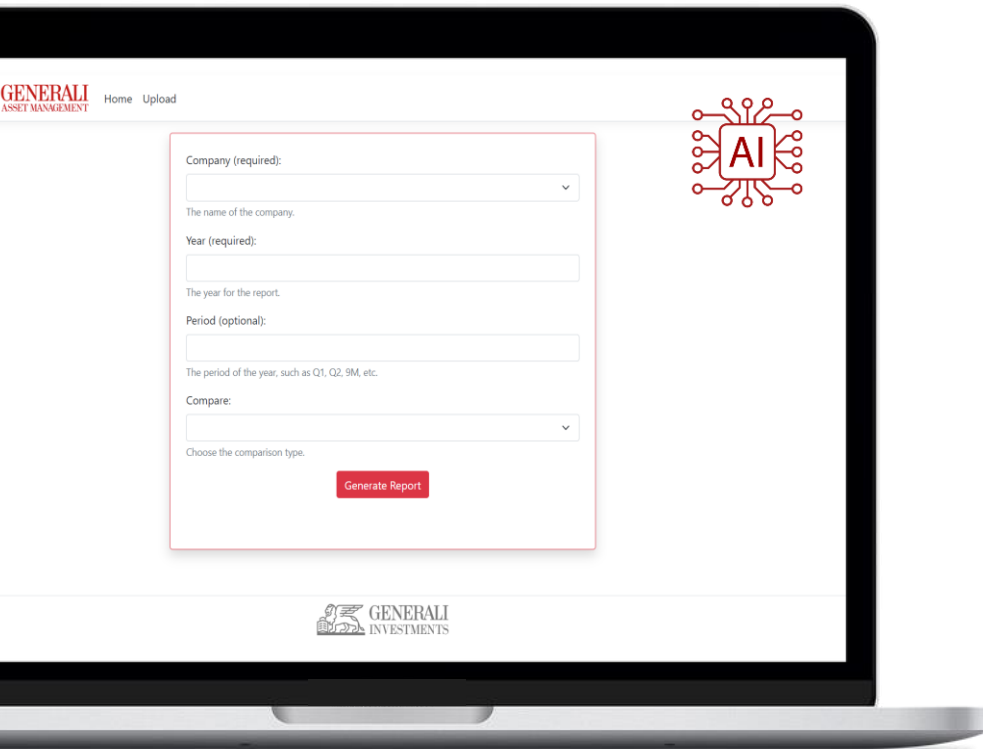
- Incubate **new specialized competencies** over time
- **Generate alpha** in a consistent manner over time, **remaining competitive**
- **Talent retention** and **attraction**

The three levels of the AI academy:



# Several AI initiatives are being implemented in Generali Asset Management

ILLUSTRATIVE



**▶ GENERATIVE AI AT SCALE FOR ADVANCED RESEARCH ANALYSIS**

**▶ AUTOMATION OF DATA EXTRACTION FROM MULTIPLE DATA FORMAT**

**▶ MACHINE LEARNING FOR RISK MANAGEMENT AND INVESTMENTS**



**THANK YOU!**