

EVALUERVE

AI

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Rewriting the Rules

How **Agentic AI** is Transforming Private Equity

The Rise of Agentic AI – A New Era in Intelligence

Artificial Intelligence (AI) has moved from buzzword to boardroom essential. From rule-based systems to machine learning, we've now entered the era of agentic AI – proactive systems that make autonomous decisions, understand context, and collaborate with humans.

In 2025, the fusion of generative AI, agentic frameworks, and domain-specific intelligence is reshaping industries – especially high-stakes fields like private equity, where speed and insight are vital. Agentic AI is no longer just a tool; it's becoming the core engine behind smarter decisions.

Unlike traditional AI, which relies on structured inputs, agentic AI thrives in ambiguity – interpreting complex data, initiating actions, and adapting in real time, all while keeping humans in the loop. This synergy is unlocking new levels of productivity and insight across the investment lifecycle.

Key Trends Driving the Shift:

- **Human-in-the-loop AI:** Blending machine efficiency with human intuition to ensure accuracy, relevance, and ethical oversight
- **AI Agents:** Specialized bots designed for tasks like deal sourcing, company profiling, and due diligence - delivering faster and deeper insights
- **Platform Integration:** Embedding AI directly into existing workflows and tools, enabling seamless adoption without disrupting core operations

Agentic AI isn't just rewriting the rules, it's redefining what intelligence means in the world of private equity. The firms that harness its power today aren't just keeping pace – they're shaping the competitive edge of tomorrow.

Why Private Equity Can't Afford to Work in the Old Ways

Private equity firms face a more complex, competitive, and data-heavy landscape than ever. The traditional model—manual research, siloed workflows, and slow decisions—struggles to keep pace with today's market demands. ***Today's PE firms face a convergence of challenges that demand a new operating model:***

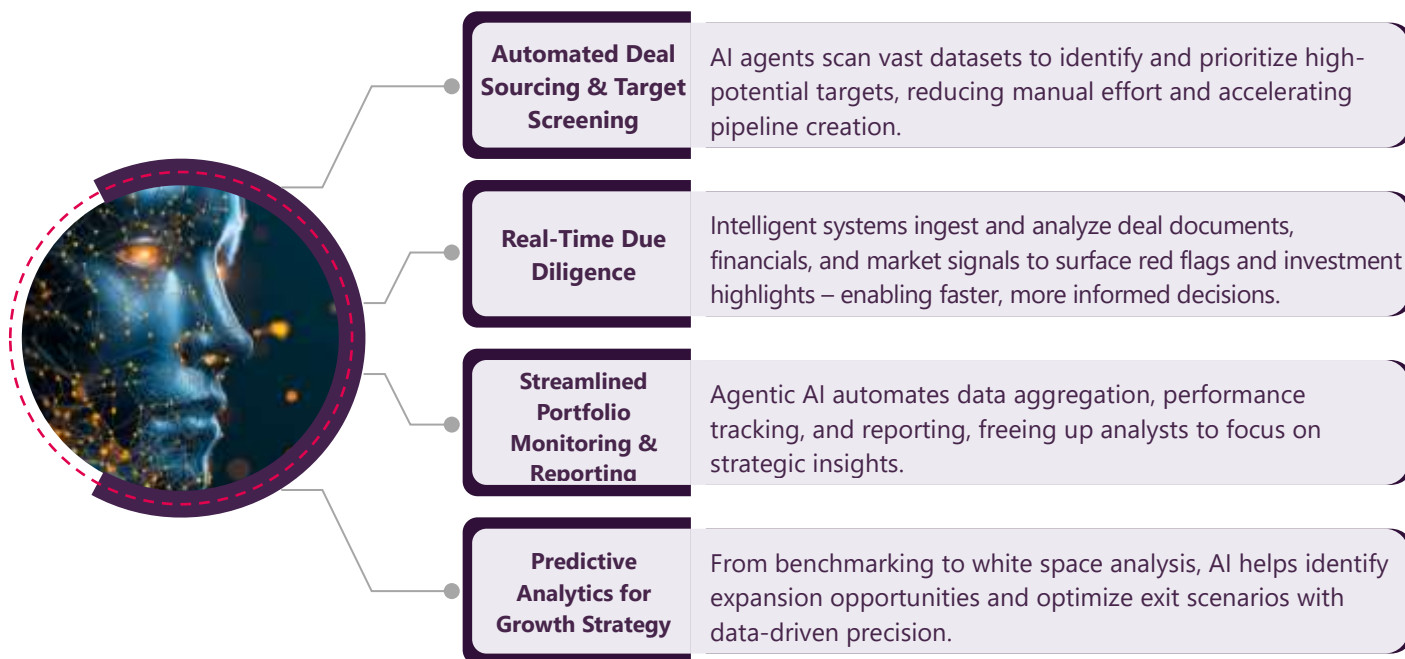
Data Deluge: Investment teams are drowning in financials, filings, and alternative data—making insight extraction slow and error-prone.

Speed to Deal: The window to act is shrinking. Winning firms move from insight to execution in days, not weeks.

Portfolio Complexity: Managing diverse assets needs scalable intelligence – static tools can't keep up.

Competitive Edge: It's no longer about access, but agility. Smarter sourcing and faster decisions define market leaders.

How Agentic AI Addresses these Challenges?



Evalueserve's Vision – Expert-Guided AI

Evalueserve has long stood as a trusted partner to global private equity firms, known for its deep domain expertise and scalable delivery model. But in recent years, the firm has taken a bold leap forward – redefining how intelligence is delivered through the fusion of cutting-edge AI and human insight. With over **5,500 domain experts** and a presence across **eight global delivery centers**, Evalueserve is not just adopting AI, it's architecting a new standard for strategic support.

The Mind+Machine Philosophy

At the heart of Evalueserve's approach lies a simple but powerful belief: pair AI with human judgment and focused strategy to turn data into results. Our Mind+Machine framework ensures that technology amplifies (not replaces) expertise. This philosophy delivers:

1. Speed & scale through AI-powered automation and intelligent agents
2. Context & insight from seasoned analysts who understand sector-specific nuances
3. Quality & relevance via rigorous human validation and customization

This hybrid model transforms raw AI output into strategic intelligence that aligns with client goals and investment theses. AI can generate data, but Evalueserve ensures that data becomes decisions.

Platforms like Insightsfirst and Spreadsmart, along with integrations with tools like Microsoft Copilot, ChatGPT, and internal agents, enable seamless delivery of high-quality, client-aligned outputs.

Genie – The Agentic AI Studio Built for Private Equity

At the heart of Evalueserve's AI strategy is Genie—our proprietary agentic AI studio built for private markets. Genie equips analysts with intelligent agents that speed up research, cut turnaround time, and boost insight quality across the investment lifecycle. Already delivering measurable impact, Genie is driving efficiency, precision, and strategic value in key private equity workflows.

Across these use cases, Genie consistently delivers 30–40% efficiency improvements, transforming how PE firms operate. It's not only about speed, it's about working smarter and more strategically.



Real-World Impact – Case Studies That Speak Volumes

Case Study 1: Europe-Based Global Private Markets Firm

A leading private equity firm headquartered in Europe, managing a diverse portfolio across sectors and geographies, sought to modernize its investment lifecycle using AI.

Challenge:

The firm was grappling with a set of operational hurdles that were slowing its momentum – manual data analysis, inefficient lead generation, limited predictive insights, and broader process inefficiencies across the investment lifecycle. Traditional workflows were no longer scalable, and the lack of intelligent automation was constraining both speed and strategic clarity.

Solution:

Evalueserve deployed a dedicated team of 25+ FTEs across its India and LATAM centers to support global deal teams. Operating on a secure client server and using both proprietary Evalueserve tools and ChatGPT's Enterprise, the team delivered deep-dive insights to drive deal origination, identify attractive industries and trends, and build a valuable pipeline to track potential targets.

Outcome:

- 10-12% efficiency gain in execution
- 15% reduction in turnaround time across key workflows
- Improved decision-making accuracy through AI-augmented insights
- Optimized portfolio monitoring with automated reporting and dashboards
- Deeper, faster insights for deal origination and target evaluation

Case Study 2: UK-Based Deal Advisory Firm

A UK-based advisory firm supporting VC and corporate clients needed to identify high-growth private companies across multiple sectors – quickly and consistently.

Challenge:

The firm struggled with fragmented data sources, manual screening processes, and limited visibility into emerging opportunities. They needed a scalable solution to detect small & medium private companies with high growth potential and target green-flag companies for VC and corporate clients to invest in.

Solution:

Evalueserve implemented GenFI with Insightsfirst Opportunity Radar, leveraging AI to automate opportunity identification. Sector-specific triggers and alternative data (e.g., website traffic, hiring trends) were used to surface early-stage companies with high growth potential. Alongside the insights generated by technology, our experts ensured each opportunity was relevant and aligned with the go-to-market strategy of each sector. Also, they helped prioritize and convert opportunities with extra insights – target profiles, company benchmarking, transaction and trading comps, etc.

Outcome:

- 20-30 growth opportunities delivered weekly across seven sectors
- Early detection powered by financial KPIs and alternative signals
- Rapid insights enabled via natural language Q&A and SQL database queries

Final Thoughts: The Future is Agentic

Private equity is entering a new era - one where intelligence is not just gathered, but generated, and where speed and precision are no longer trade-offs. Agentic AI is at the heart of this transformation, empowering firms to move faster, think deeper, and act smarter.

Evalueserve's vision of AI with a human touch is more than a philosophy – it's a proven model. With platforms like Genie, and a global team of domain experts, Evalueserve is helping PE firms rewrite the rules of engagement.

The firms that embrace agentic AI today aren't just adapting – they're leading. And in a market defined by agility and insight, leadership is the ultimate competitive edge.

About the Authors:



Deepesh Bhatnagar

Vice President and Head, Private Equity

- Has 18+ years of experience in Private Equity, Corporate and Investment Banking

✉ Deepesh.Bhatnagar@evalueserve.com



Arpit Varma

Associate Director

- Has 15+ years of experience in Financial Research, supporting Private Equity and Investment Banking clients

✉ Arpit.Varma@evalueserve.com