

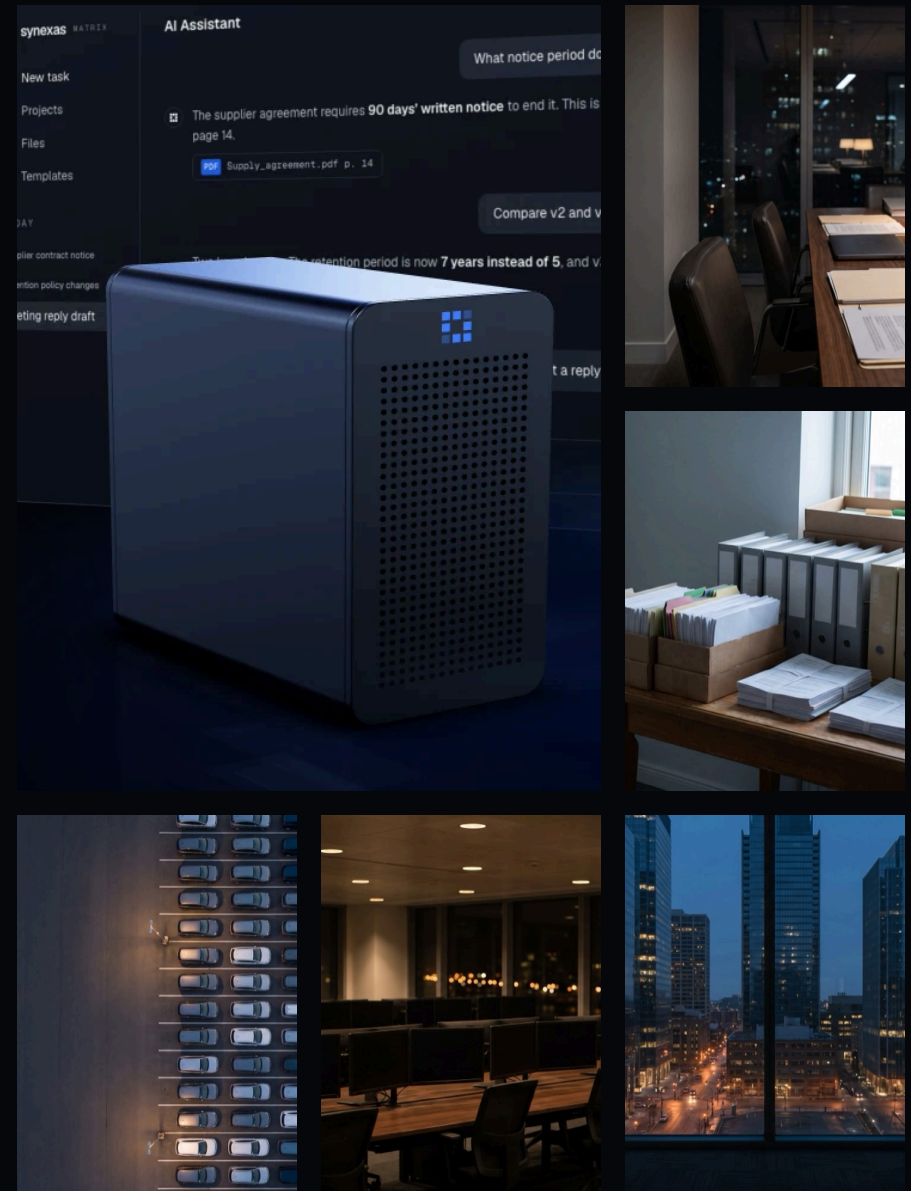


ON-PREMISES AI
FOR FINANCIAL SERVICES

Built for your work. Kept in house.

Synexas builds AI for specific financial work, from IPO inquiries to installation checks, and runs it on a system at your institution.

-  Runs fully offline
-  Every result shows its evidence
-  Decisions stay with your people



Three kinds of financial work that wait on specialists



IPO INQUIRIES

Inquiry replies take 1–2 weeks of overtime

Deal teams search precedent, gather evidence and draft each answer under deadline pressure.

Case 1

p. 6 →



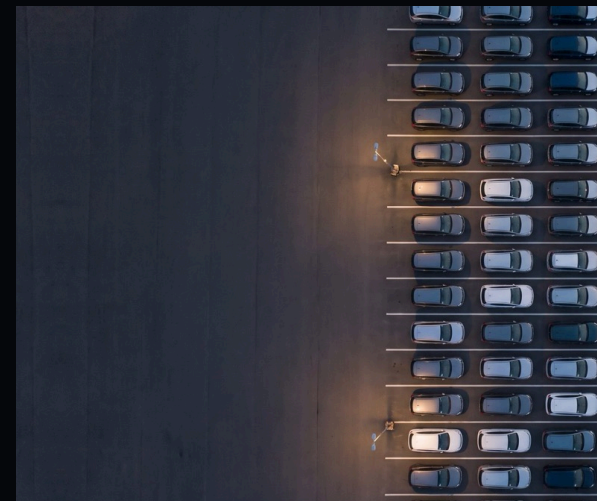
WORKPAPERS

Thousands of files must agree

Confirmations, statements and contracts are checked by hand against a procedure.

Case 2

p. 8 →



COLLATERAL CHECKS

Photos are checked only by sampling

Financed assets need evidence, but staff can review only a sample before exceptions slip through.

Case 3

p. 10 →

🎯 Most teams start with one of these. Each has a case in this brochure, from a securities firm to a listed auto-finance lender.

What changed for three teams

Three systems Synexas built, each around one team's own data, steps and people.

IPO INQUIRIES

Securities firm

3–5 days

for a strong first draft of a reply, where it took 1 to 2 weeks of overtime

Reported by the customer

Case 1 →

WORKPAPERS

Securities firm

3 days

to cross-check an audit file, down from 2 weeks

Customer result

Case 2 →

COLLATERAL CHECKS

Listed auto-finance lender

100%

of installation photos checked, 10 seconds each, up from a sample

Customer result

Case 3 →



Runs offline, on site

Offline by default. Nothing leaves without your approval.



Your people decide

Unclear results, approvals and filings go to the person who owns them.



One agreed price

The machine, the software and the setup, with no per-token fees.

Meet Matrix.

Your company's AI system.

The machine, the AI software and the on-site setup. One complete offer, one agreed price.

01 The machine

Chosen from validated configurations, sized to your workload.

02 The AI software

An assistant, team tools and custom workflows, running locally.

03 On-site setup

Installed and adapted by our engineers, around your files and tools.



A familiar assistant for controlled files

The assistant every team gets, answering from the files each person may use.

The screenshot shows a dark-themed user interface for an AI assistant. At the top, it says 'AI assistant' with a status indicator 'On this system · offline'. On the left is a sidebar with the 'synexas' logo and navigation options: 'New task', 'Projects', 'Files', 'Templates', and a section for 'Q4 AUDIT FILE' containing 'Bank confirmation' (highlighted), 'Counterparty seals', and 'Review pack summary'. The main area is titled 'Q4 audit file' with 'Project · 6 members' and another 'On this system · offline' status. A question box asks, 'Does the bank confirmation match the ledger balance for Q4?'. The assistant's response is: 'No. The confirmation shows \$4,218,300 and the ledger shows \$4,281,300. The 1 and the 8 are swapped, which points to a transposition in the ledger rather than a missing entry. I marked it for the client to confirm before sign-off.' Below this, it lists 'Sources · 2 files' with two PDF thumbnails: 'Confirmation_BankA.pdf p. 2' and 'Ledger_Q4.pdf p. 41'. At the bottom is a text input field with a plus icon and the text 'Message AI Assistant', and a circular button with an upward arrow.

Review approved evidence

Compare reports, policies and research, with sources and open questions visible.

Assemble review packs

Bring case facts and policy references together in a draft for your reviewer.

Find the approved answer

Find procedures and prior analysis in the files your team may use.

01

CASE 1 OF 3 · IPO INQUIRIES · SECURITIES FIRM

1–2 weeks of overtime for every inquiry round

Each round of review questions on an IPO took the deal team 1 to 2 weeks of overtime: finding precedent, gathering evidence and drafting a reply to every question.

EVERY ROUND

Many questions to answer

PRECEDENT

Searched by hand

FOLLOW-UPS

Hard to foresee

Inquiry replies start from precedent and evidence

Built around the team's own prior inquiries, filings and review files. The same for your regulatory, audit or credit questions.

IPO inquiry replies

● On this system · offline

QUESTION 7 · GROSS MARGIN

Explain why gross margin rose from 31% to 38% while peers' margins fell. Quantify the effect of mix, prices and costs.

SIMILAR PAST INQUIRIES · 12 FOUND

Listed

Electronics maker · margin above peers

Answered with a mix, price and cost bridge

2 rounds

Materials supplier · rising margin

Follow-up on raw-material prices

Withdrawn

Device maker · margin and customers

The reply gave no comparison with peers

REPLY PLAN

1. Split the change into mix, price and cost, from the ledger.

2. Compare with three peers, from their public filings.

3. Show why the margin can last: contracts and capacity.

DRAFT CHECK · 2 GAPS

Peer margins for 2025 are missing.

No evidence is cited for the price increase.

LIKELY FOLLOW-UP QUESTIONS

Will the margin hold if raw-material prices rise?

Why do the five largest customers pay higher prices?

1 Precedent first

Similar past inquiries, how they were answered and what followed.

2 Reply plan and evidence

The points to answer, the files each needs and the likely follow-up questions.

3 Gaps marked before review

Missing peer data and uncited claims are marked before the team edits the draft.

THE RESULT

IPO inquiry replies, drafted in 3–5 days

- Reported by the customer

75%

higher efficiency in IPO inquiry replies

3–5 days

for a strong first draft, where the manual process took 1 to 2 weeks of overtime

02

CASE 2 OF 3 · WORKPAPERS · SECURITIES FIRM

Thousands of papers that must agree

An IPO file holds thousands of confirmations, statements and contracts that must agree with each other. They were checked by hand against the procedure, and none of it could reach a cloud service.

EVERY FILE

Thousands of documents

CHECKS

By hand, against the procedure

CLOUD SERVICES

Not allowed

IPO workpapers pre-screened before review

Built around the firm's own review procedure. The same for your KYC or transaction files.

IPO workpaper review

On this system · offline

Cross-file check

Confirmations

Site visits

Vouchers and controls

Bank statements

Patents

Completeness

OVERALL CONCLUSION

Needs attention

2 findings

4 items to provide

Medium

Return courier slip not found

Step 4.2.1 (11) · Q4 file, p. 3

Low

Seal does not match the party

Step 4.2.1 (9) · Q4 file, p. 1

Export fix list

Run again

CHECKED AGAINST YOUR PROCEDURE

Step	Procedure	Result
4.2.1	Confirmation ratio and scope	Not tested
4.2.1 (11)	Sent and returned by courier	Finding
4.2.1 (9)	Seal and signature on reply	Finding
4.2.2	Confirmation control log	No issue

YOUR TEAM TO PROVIDE · 4

1. Ledger detail, to test the ratio in 4.2.1

2. Courier tracking for returned replies

3. Source for the registered address

4. Log of letters not returned

1 Many checks, one pass

Confirmations, site visits, vouchers and controls, bank statements, patents and completeness.

2 Tied to your procedure

Each finding cites the step it fails, with the items your team must provide.

Deployed at the project site

The workflow ran on one portable system with its own private network.

THE RESULT

An audit file cross-checked in 3 days, not 2 weeks

- Customer result

3 days

to cross-check an audit file, down from 2 weeks

0

documents left the project site

03

CASE 3 OF 3 · COLLATERAL CHECKS · LISTED AUTO-FINANCE LENDER

Installation photos checked only by sampling

Every financed vehicle needs photos proving its tracker sits in an approved spot. Staff could check only a sample, so a wrong installation could slip through.

EVERY VEHICLE

Photos of its tracker

CHECKS

Only a sample, by hand

RISK

Wrong installations slip through

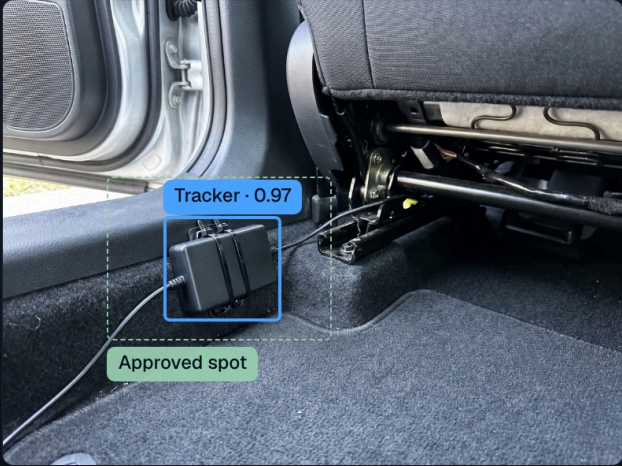


Every installation photo checked before funding

Built around the company's approved installation spots and review rules. The same for your collateral and field evidence.

Installation photo check

● On this system · offline



Close-up photo taken by the installer

RESULT

Passed automatically

All checks met Confidence 0.94

✓ Tracker in an approved spot

Lower pillar trim, beside the front seat

✓ Two people on site

In the wide photo; a reflection is not counted

✓ Photo is usable

In focus, tracker fully visible

Below the confidence threshold, the photo goes to a reviewer with this evidence.

- 1 Device in the right place**
Each close-up is checked for the tracker's position against the approved spots.
- 2 People, not reflections**
The rules ask for more than one person on site; reflections in glass are not counted.
- 3 Unsure goes to staff**
Clear photos pass automatically; unclear ones go to a reviewer, with the reason shown.

THE RESULT

Every photo checked, not only a sample

- Customer result

100%

of installation photos checked, up from a sample

10seconds

per photo; unclear ones go to a reviewer with the reason

Client and deal data stay in your institution



No outside AI connection

Matrix runs offline, on site. Outside services only if you approve them.



Never sent to an AI provider

Your files, questions and answers stay in your company's local environment.



Your IT team can check

Watch outbound traffic at your firewall: none, unless you approved a service.

YOUR SITE · YOUR NETWORK

YOUR DATA



Client files and KYC records

Approved files for each team



Filings and workpapers

Replies, confirmations, checklists



Loan and collateral records

Contracts, photos and review notes

SYNEXAS MATRIX

Assistant, team tools and custom workflows

Open-weight AI models, running locally

The machine, at your site



YOUR PEOPLE



Analysts and reviewers

From their own computers



Each by role

Only the files they may see



People decide

Every result shows its evidence



Internet and cloud AI services

Closed by default

Only services you approve. Your firewall log can confirm it.

How Matrix compares

WHAT MATTERS TO YOUR TEAM	 SYNEXAS MATRIX	CLOUD AI SERVICES	BUILDING IT YOURSELF
Where data is processed	 At your site. On the Matrix hardware, inside your network.	With the provider. The service processes the questions and content supplied for the task.	On servers you buy and run. Where data goes depends on how your team builds it.
Internet required	 No. It works offline by default.	Yes. AI work depends on a connection to the provider's service.	Your choice. Set by how your team builds it.
Who builds the workflow	 Our engineers, around your task, on site.	Your team, with the tools the service provides.	Your engineers, from scratch.
What you pay for	 One agreed price, with no per-token fees.	Usage or plan fees, at the provider's rates.	Hardware, software and your staff's time.

Local deployment does not create automatic compliance or certification.

Your team stays in control

Your team holds every administrator account, and Synexas keeps none.

Administration ● On this system · offline

1 Access by role

Role	IPO	KYC	Credit
IPO analyst	✓	—	—
Compliance reviewer	✓	✓	—
Credit officer	—	—	✓
Sales	—	—	—

2 Usage records

Time	Person · use
08:55	E. Brooks · IPO analyst AI Assistant · 6 questions
09:32	H. Tanaka · Compliance reviewer Document processing · 38 confirmations read
10:04	P. Singh · Credit officer Photo check · 3 photos checked
10:18	E. Brooks · IPO analyst AI Assistant · 4 questions

3 Updates and visits

Offline updates
 Offline packages, installed on site in about 30 minutes. Your team decides when to install.

Your team decides

Engineer visits
 Only when invited, on site and supervised. Access is granted and removed by your team.

Customer supervised

1 Access by role

Each person sees only the files they are allowed to.

2 Usage records kept on site

The system keeps usage records on your hardware. Each person opens only their own conversations in Matrix.

3 Updates and visits on your terms

Your team decides when to install each offline update. Our engineers work on the system only when you invite them, on site, with access you grant and remove.

Private AI, delivered on site

Synexas Inc. builds and installs private AI for organizations whose data must stay inside, including a securities firm, a construction group, a law firm and an industrial research institute.

50+

Organizations served

20+

Industries deployed

1M+

Monthly agent users

\$2.6M+

Estimated annual value
per enterprise

As of October 2026.

Installed at your site in about 30 minutes

Plug it into power and your network; your IT team assigns an address. Workflows are then set up with your team.



Matrix Team

A desk-side tower that runs on a standard outlet.



Matrix Standard

A tower. Its power and space needs are confirmed for your site.



Matrix Enterprise

Rack-mounted, for your server room.

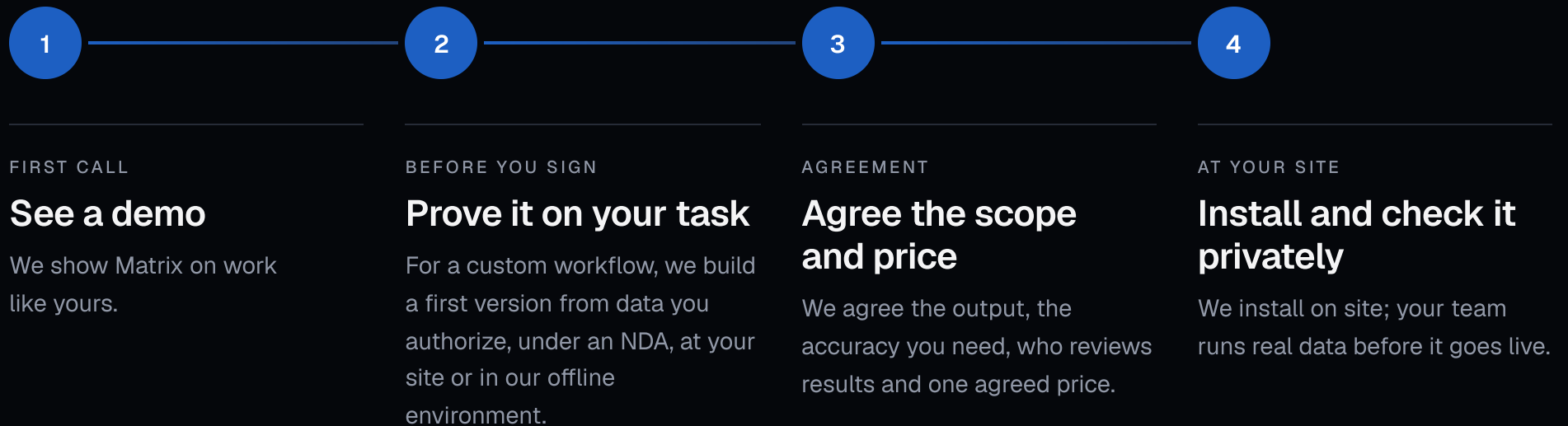


Offline updates

No internet connection needed. Updates arrive as offline packages that your team installs on site.

Start with one task.

You agree a price only after you have seen it in action.



What you see in the demo

The assistant, custom workflows and controls at work on tasks like yours. Bring the one task that takes your team the most time.

Let's make AI useful. For your actual work.

Tell us which review, filing or check takes your team the most time. In a 30-minute call, we show what Matrix can do on similar work.

Request a demo →

 **Leah He** leah@thesynexas.com

 contact@thesynexas.com

 thesynexas.com

FURTHER READING

[Privacy & security](#)

[Common questions](#)

[Purchase guides](#)

