

FEBRUARY 2026

# NEWSLETTER



In January, we enrolled in the [ChaiTech](#) accelerator, to showcase InvestLens to investors. We are also bringing on individuals with decades of expertise in R&D, marketing, and data analytics. In addition, the platform now supports enterprise clients through a backend administrative console and client-facing billing and user management. We integrated [Stripe](#) to help ensure client payment data remains secure. Access to the platform remains free of charge, but the tools are available for testing.

## Highlights

InvestLens aspires to become a platform of record for enterprises. So, we built features that enable larger teams to collaborate and delegate administrative privileges. Organizations can now onboard members and set their roles via Organization Console in the main UI.

## What changed

- All accounts are transformed into organizations. By default, they support four roles: Member, Billing, Admin, and Owner.
- For members with Billing or Owner roles, the profile menu in the main UI now includes a Billing tab. This allows users to select the appropriate plan (for example, Individual vs. Group).
- For members with Admin or Owner roles on a Group plan, an Organization Console tab is available in the main UI. This enables organizations to manage members and set permissions.
- The platform is integrated with Stripe, currently operating in sandbox mode (real credit cards are not accepted).

## Platform updates

### ChaiTech Accelerator

The ChaiTech's mission is to accelerate the success of Jewish-led and co-led startups by providing structured entrepreneurial training and mentorship. The Accelerator is funded by the government of Ontario and offered in collaboration with [Prosserman JCC](#), and [Schulich School of Business](#). GM Advisors is a proud participant in Cohort 6, and InvestLens will take part in the pitch competition at the end of March.

### Organization Support

InvestLens aims to become a platform of record for enterprises. This month, we focused on features that support onboarding of larger teams. Thus, organizations are now the core unit for authentication across the platform. Existing accounts have been migrated into single-member organizations, and new individual sign-ups are created as single-member organizations by default. This change requires no action from existing users, while aligning the platform with SaaS best practices for enterprise access management.

### Organization Admin Console

Each organization can assign roles to its members, which is especially useful for larger teams where Billing and Admin privileges must be delegated to different individuals. InvestLens supports two layers of organization management: (1) backend administration through a global administrative console, and (2) a client-facing console available to members with Owner or Admin roles. Administrators can invite new members, assign roles, and manage access. They can also view the membership roster and invitation history.

### Billing Console

To meet SaaS best practices, we integrated Stripe into the platform. This enables members with the Billing role to enroll in subscription plans, update or cancel them, download invoices, and view subscription history. Stripe is the provider of choice for many platforms. Delegating payment handling to a trusted third party with a strong track record of service quality helps ensure InvestLens follows best practices for protecting personal information. It also prevents our team from having to maintain the complexity of a full payment engine.

### R&D Firm

GM Advisors aspires to become a premium R&D provider for education and finance institutions. To support this vision, we have been recruiting researchers and data scientists with decades of experience. This positions us to offer [AWS Solutions](#) for education and finance clients, and to provide guidance on how to adopt AI within institutions. To build this reputation, we continue advancing our price prediction model and have entered the performance evaluation stage for our implied volatility estimator. To ensure transparency, once these methods meet our internal benchmarks, we will publish the relevant documentation in our [Help Center](#).

## Upcoming

We found that mainstream methods for estimating implied volatility, a forward-looking indicator of risk, come with limitations, including sensitivity to sparse or noisy option data and simplifying assumptions that can break down in real markets. Addressing these issues requires careful modeling choices and extensive validation, so this work is taking longer than we initially expected.

We continue working on our approach to estimating implied volatility with the goal of resolving some of these limitations. We plan to use these enhanced estimates in reporting, since many portfolio managers view implied volatility as more trustworthy than purely historical measures.



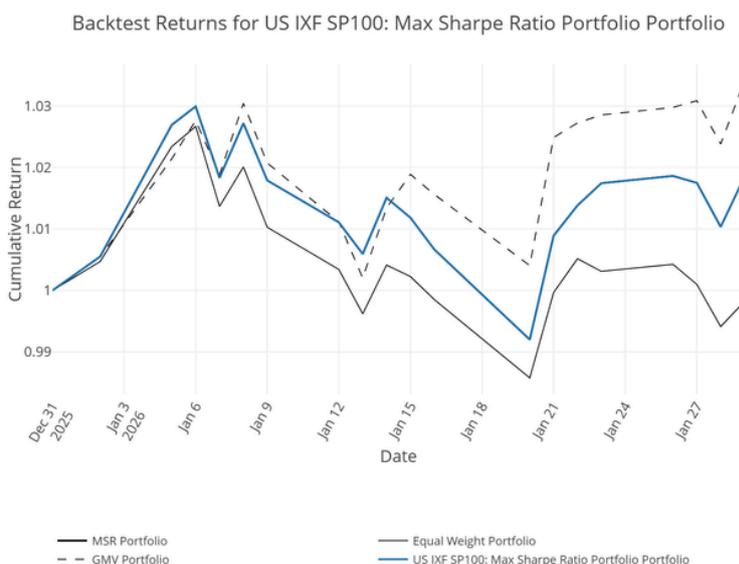
# Analytics in Practice

[Last month](#) we built a focused US Financials basket for broad sector coverage that is not riskier than the overall equity market. Using the Universe Screener (Custom tab), we defined “slices” of the market by combining country, benchmark, and sector filters, as shown in the table below (US Financial Services was drawn primarily from IXF, with a small complement from S&P 100 Financials).

COUNTRY	BENCHMARK	SECTOR	POSITION
US	IXF	Financial services	10
US	S&P 100 (SP100)	Financial services	2

We employed the Universe Screener and converted our idea into a new portfolio. Position weights were constrained to 2%–12% (0.02–0.12), preventing holdings from becoming immaterial or overly concentrated contributors to risk. The portfolio was titled US IXF SP100.

We then ran the portfolio through the Asset Allocator to optimize weights under our selected constraints. We saved the max Sharpe Ratio portfolio as US IXF SP100: Max Sharpe Ratio Portfolio.



Since initial construction, InvestLens was tracking US IXF SP100: Max Sharpe Ratio Portfolio. The plot above shows cumulative returns from the end of December 2025 through late January 2026 for four weighting schemes: the baseline basket (blue), which is nearly indistinguishable from the MSR portfolio over most of the window, plus equal-weight and GMV.

After an early rise into the first week of January, the portfolios experience a mid-month pullback and then diverge sharply. GMV finishes the period on top, with the strongest late-January rebound, while the baseline/MSR line ends positive but below GMV. The equal-weight portfolio trails, showing deeper drawdowns and a weaker recovery by the end of the window.

In [conclusion](#), the Global Minimum Variance portfolio can outperform “chasing” maximum expected returns, especially when volatility is elevated. Using the optimizer and a backtest over the last month, we see that the Maximum Sharpe Ratio (MSR) portfolio still outperforms a naïve equal-weight approach, even in a choppy regime where diversification alone is not enough. That matters because January was packed with event-driven headlines, from geopolitical flare-ups and trade rhetoric to widely covered disputes like the Greenland-related tensions. This is a useful reminder that risk control can be a return driver, and disciplined optimization can beat simple heuristics without relying on calm markets.

Please see the complimentary video [here](#).