InvestLens

https://gmadvisors.ca

MAY 2026

NEWSLETTER

Highlights

Creating portfolios could not be easier. Our new autocomplete features make it faster to build and modify portfolios with many assets. Users can now avoid repetitive data entry, reduce manual recalculations, and quickly apply shared allocation ranges across multiple assets. It is another step toward making InvestLens smoother, faster, and more responsive to real user workflows.

In April, we improved the user experience for features related to creating new portfolios. These enhancements allow users to create portfolios in just a few clicks, making the overall workflow smoother and more intuitive. Our development team also successfully completed AWS Certification exams, bringing GM Advisors closer to achieving tiered AWS Partner status. As our pipeline includes multiple improvements in both financial modelling and AI deployment, we have engaged experts to help create a series of YouTube videos. These videos will introduce the platform, review its features, and support broader financial literacy among the public.

What changed

- Data entry in the new (edit) portfolio screen has been automated for faster workflows.
- Market data extraction now includes a more refined integrity verification flow.
- Additional refinements and small improvements were made across the platform.

Platform updates

InvestLens AI Assistant
Our agentic portfolio reporting system remains in active development. The system is designed to generate portfolio reports using validated analytical tools, with an emphasis on accuracy, transparency, and controlled execution. We expect to continue testing and refining it over the coming months before broader release.

Implied volatility estimation
Our implied volatility estimation methodology remains an active part of our development roadmap. While progress was limited this month due to competing priorities, we expect to advance this work in the coming month. The methodology continues to focus on addressing key sources of error, including truncation bias, discretization error, American-style option pricing effects, approximation error, and dividend treatment, with the goal of producing more theoretically consistent forward-looking volatility estimates.

Data Validation and Integrity
We have completed work on our enhanced data extraction and validation process. An updated data download module has now been deployed, with integrity verification, split-adjustment checks, and automated warning notifications when further investigation is required.

Learning and Certification
Our development team has successfully passed the AWS certification at the associate level in solutions architecture, ML, and Artificial Intellegence. This puts us closer to the tierd AWS partner status, and equips us with tools and knowledge to make better infrastructure decisions.

Upcoming

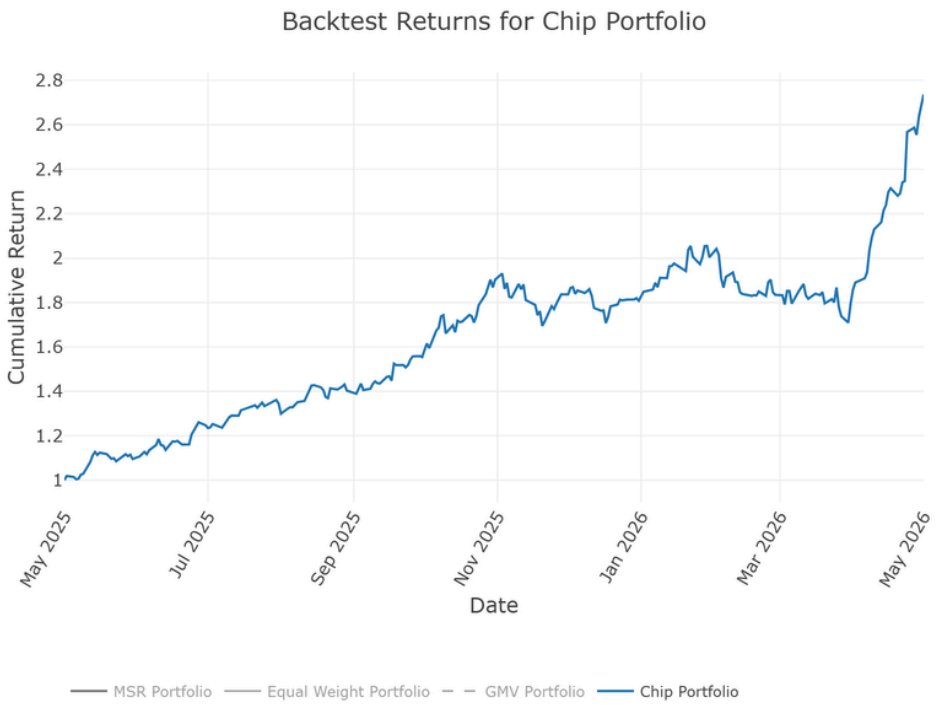
We have continued advancing the InvestLens agentic system designed to intelligently orchestrate tools across the platform. In the coming months, we expect to make an iteration of this system available to testers. In parallel, our R&D team has started work on a scenario stress-testing module that will evaluate portfolio outcomes against historical data distributions classified as bear, neutral, or bull market environments. We also expect to release a white paper on our implied volatility estimation methodology. **As with our broader product development, this work remains centered on human accountability, expert oversight, and strict guardrails designed to support transparency, reliability, and trust.**

Analytics in Practice

This month, we present a brief workflow demonstrating how InvestLens can be used to quickly evaluate momentum within a selected industry or sector. In this example, we focus on major AI infrastructure companies, including leading semiconductor firms and hyperscalers.

Major AI Semiconductors & Hyperscalers
AMD Advanced Micro Devices Inc
AMZN Amazon.com Inc
GOOGL Alphabet Inc Class A
INTC Intel Corporation
NVDA NVIDIA Corporation

For this exercise we assign equal weights at portfolio creation, and set the horizon to one year. We name the portfolio Chip, and use the backtester in our optimization module. We disable all other objectives except the equal-weight trajectory.



Over the tested one-year window, the equal-weight Chip Portfolio generated a strong cumulative return, with a particularly sharp increase near the end of the period. The return path, however, was not linear. The portfolio experienced periods of volatility and temporary weakness before recovering, highlighting the importance of evaluating both upside potential and risk.

This example shows how InvestLens helps users quickly test an investment theme and move beyond return alone. For AI infrastructure exposure, the backtest suggests strong recent momentum, while also reminding investors that thematic portfolios should be assessed across performance, volatility, drawdowns, and risk-adjusted metrics.

Please see the companion video here: https://youtu.be/LtEoa4odkMo