

JUNE – JULY 2026

NEWSLETTER



In June-July, InvestLens continued to expand its portfolio analytics and AI capabilities with the introduction of **Iris**, our integrated market-analysis agent designed to help users understand stock-market dynamics and make better use of the platform's tools. **Iris** has most InvestLens functionality integrated and can support complex workflows, including selected event analysis, portfolio reviews, and multiple backtests against pre-specified benchmarks. It is aware of the market calendar, incorporates our media-sentiment tool, and can navigate users across the InvestLens feature map according to their needs.

Highlights

Understanding market sentiment cannot be easier through our AI-driven media-sentiment tool. Registered users can track up to five assets, with real-time sentiment indicators that are intuitively colour-coded from red for negative coverage to green for positive coverage. **Iris** can review the underlying articles influencing each asset's AI-generated sentiment and perform increasingly sophisticated comparisons as new coverage becomes available. Results are presented in a clear, visually appealing table, helping users quickly identify differences in market narratives across assets without manually reviewing an ever-growing pile of financial media.

What changed

- **Iris**, the InvestLens AI research agent, is now available.
- A new backtester compares portfolios against selected benchmarks.
- AI-driven sentiment analytics helps track and compare market coverage.

Platform updates

InvestLens AI Assistant

Meet Iris, your personal financial assistant, who is able to perform portfolio optimization, factor analysis, performance evaluation, and sentiment review using validated InvestLens tools. Iris is also fully aware of the market calendar, including upcoming and historical earnings reports for publicly traded companies.

Event-Based Portfolio Analysis

Iris supports event-based portfolio analysis by examining how a portfolio performed after significant company events, such as earnings announcements. For example, a user can ask: “Iris, please review how my portfolio performed in the 10 trading days after each of Micron’s earnings reports over the last year.” Iris can retrieve the relevant historical earnings dates and portfolio data, analyze results across the requested period, and present the findings in a report.

Portfolio PDF Reports

InvestLens can generate polished PDF reports for individual portfolios, bringing portfolio composition, optimized allocations, performance and risk metrics, factor exposures, and backtest results into one clear, shareable document. Reports also include visual performance comparisons and an analytical summary to help users interpret the results. Iris can trigger report creation directly, making it easier to move from portfolio analysis to a report.

Portfolio Backtesting

The InvestLens backtester makes it easy to evaluate a portfolio over a user-selected time window and compare it with a chosen benchmark. Users can adjust the start and end dates, select a benchmark such as the S&P 500, and run the analysis in a few clicks. The results provide a clear set of performance visuals, including cumulative price change, periodic returns, and drawdowns, helping users assess both return patterns and downside risk over time.

Upcoming

We are continuing to advance InvestLens with the goal of creating a distinctive experience in which Iris serves as a personal financial assistant for portfolio research and analysis. A key priority is improving Iris’s auditability by developing tools that allow advanced users and institutional investors to examine the evidence, analytical steps, and validated platform tools behind its recommendations. Building on capabilities such as earnings-based event analysis, we are also committed to integrating a broader range of event-driven analytics that help users evaluate portfolio behaviour around meaningful market developments. More to come.



Analytics in Practice

This month, we present a brief workflow demonstrating how InvestLens can be used to conduct event-based portfolio analysis. In this example, we review how the following portfolio of assets performed immediately after the latest Micron's (MU.US) earnings report.

Major AI Semiconductors & Hyperscalers

AMD Advanced Micro Devices Inc

AMZN Amazon.com Inc

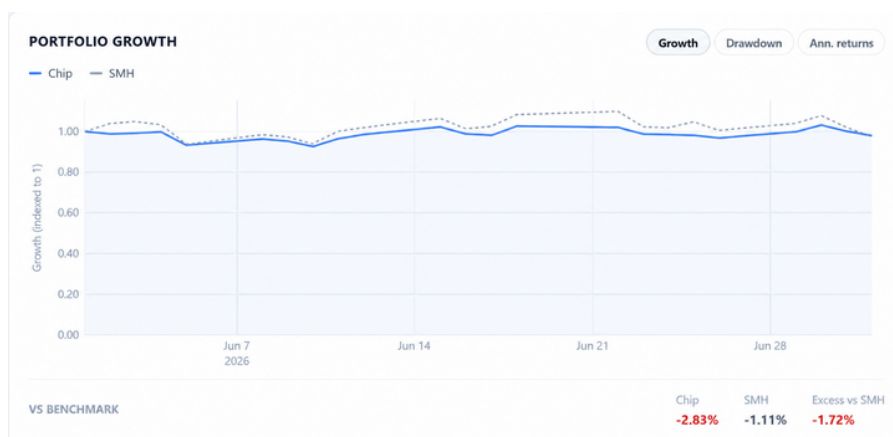
GOOGL Alphabet Inc Class A

INTC Intel Corporation

NVDA NVIDIA Corporation



We use the InvestLens backtesting tool to evaluate how our portfolio ("Chip") performed during the month following Micron's latest earnings report, compared with the semiconductor benchmark SMH. Over this period, Chip declined by 2.83%, compared with a 1.11% decline for SMH, resulting in benchmark-relative underperformance of 1.72%.



This illustrates how InvestLens helps users assess an investment theme beyond headline returns by reviewing performance, drawdowns, and benchmark-relative results. Iris can also extend this workflow into a broader event study, analyzing the portfolio's performance after multiple historical Micron earnings reports rather than relying on a single instance.

Please see the companion video here: <https://youtu.be/S0gccte9mtw>