

# rogo

To learn more, reach out to [team@rogo.com](mailto:team@rogo.com)

# Background

## What we do

**Bespoke Generative AI** for  
Financial Services.

Artificial intelligence is catalyzing a transformation within the global financial services industry.

Rogo is the first generative AI company built to help financial firms navigate this transformation.

Our mission is simple: help firms deploy bespoke GenAI by intimately understanding the way they work.

## Who we are

AI Researchers with **Financial Expertise.**

Unlike existing technology companies, our team is comprised almost entirely of former investors, bankers and AI researchers.

### Our Team

 CITADEL

LAZARD

 mongoDB

 aws

 Sentieo

Jefferies

 BARCLAYS

 GGHC

AlphaSense

J.P.Morgan

# Why do you need Bespoke Artificial Intelligence?

Generative AI is going to revolutionize financial services.



But existing AI tools like ChatGPT are not close to ready.

/ 01

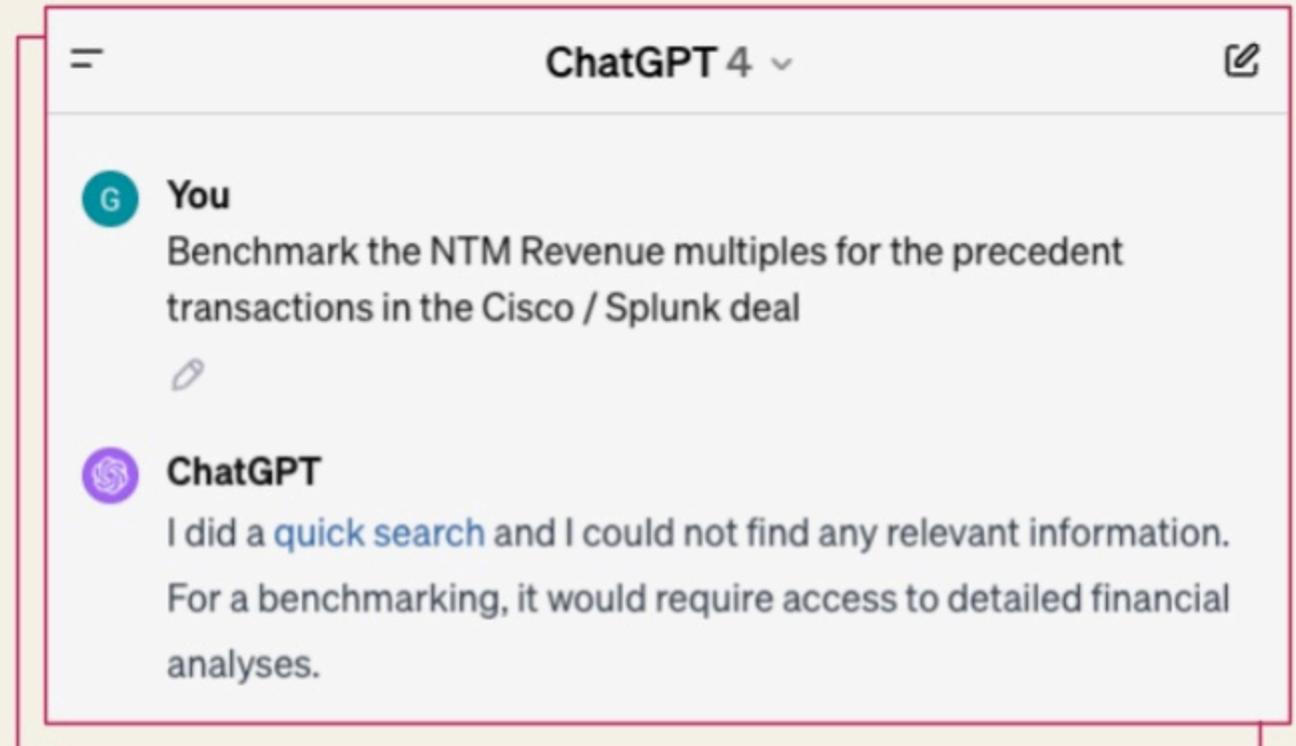
**They are too general** – lacking the right context and data.

/ 02

**They're often wrong** – lacking easy-to-audit sources.

/ 03

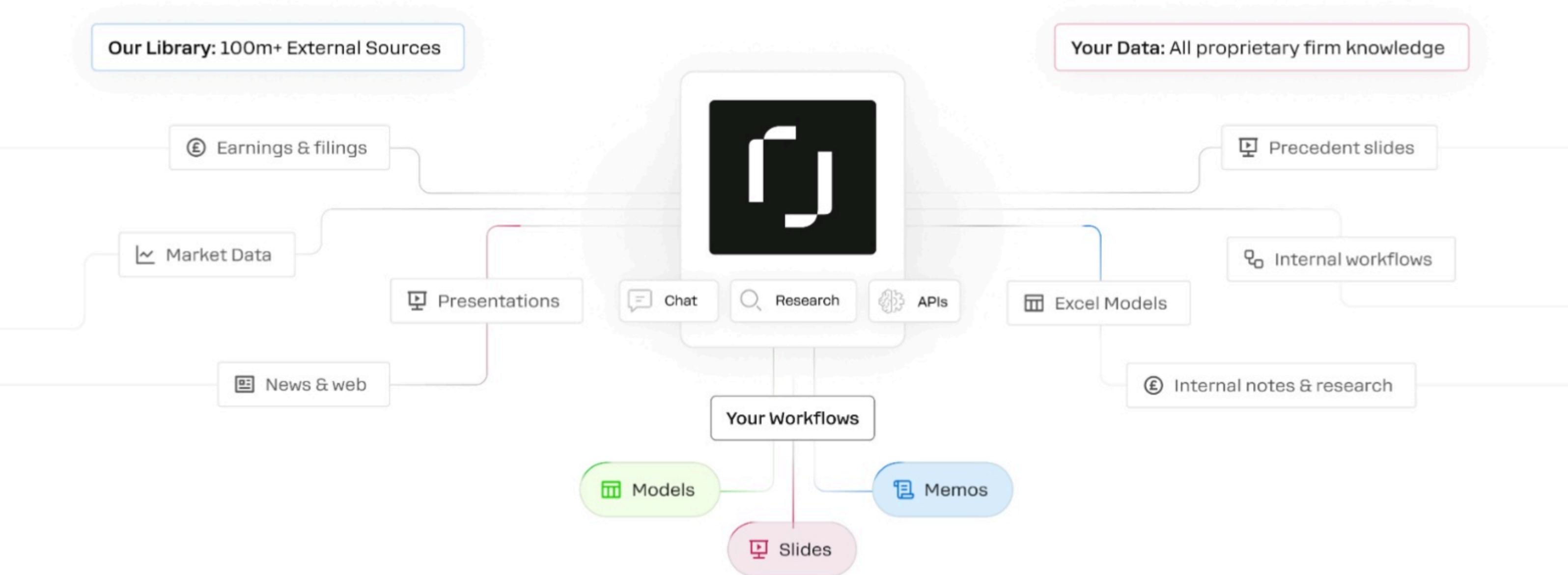
**They are not integrated** in your existing workflows.



*NO DATA. NO SOURCES. NO EXCELS.*

# Our Solution

Rogo connects a firm's knowledge to finance-specific large language models to drive faster and better-quality work across the organization.



# Meet Rogo, Your New Analyst

[Demo](#)

The screenshot displays the Rogo application interface. On the left is a sidebar with the 'rogo' logo at the top, followed by a 'New Chat' button and a list of navigation items: 'Home', 'File Search', 'PDF Chat', and 'History'. At the bottom of the sidebar are 'Templates', 'Feedback', 'Help & Docs', and a user profile for 'Chris Zachary'. The main content area features the 'rogo' logo and the text 'Begin your research...'. Below this is a search bar with the placeholder 'Ask anything...' and a green 'Ask' button. Underneath the search bar are '+ Sources' and 'File' options. A section titled 'Try asking Rogo to...' contains four template cards:

- Conduct general research**: Make a table comparing 5G and 4G – pricing, speed, frequency, popularity, etc. Then write a concise explanation of where we are globally in the transition to 5G. Sources: Web, SEC Filings.
- Benchmark Company KPIs**: Make a table of Doordash's market share in major US cities. Sources: Web, SEC Filings.
- Ask a question about earnings**: How was Disney talking about streaming profitability in their most recent earnings? Sources: Web, SEC Filings, DIS.
- Analyze historical transactions**: Find the 8-K where Biogen announced the merger with Reata and summarize the termination fee in bullet points. Sources: Web, SEC Filings, DIS.

A 'View Templates' button is located at the bottom right of the template section. At the bottom of the main content area are links for 'How does Rogo work?' and 'Help & Documentation'.

# Rogo's Use Cases

## Optimize analysts' time

1. *"Benchmark LTM Disney+ Subscriber numbers and retention"*
2. *"Find all biotech companies developing GLP-1 drugs"*
3. *"Show me how we normally model precedent transactions"*

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Rogo saves your junior team significant time across routine tasks, unlocking their ability to focus on higher leverage work.

## Make leadership smarter

1. *"How are MedTech CEOs thinking about the impact of GenAI?"*
2. *"Why might Microsoft acquire Replit?"*
3. *"Explain the difference between LLY and NVO's weight loss drugs"*

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Empower senior team members to answer their own research questions and unlock crucial insights they would not have otherwise.

## Automate workflows end-to-end

1. *"Create a PIB for Snowflake"*
2. *"Make a PowerPoint page comparing private HVAC companies"*
3. *"Send an earnings summary every time Nvidia announces"*

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Automate your firm's key workflows, start to finish, saving your team time, and empowering you to make better, faster decisions.

# Earnings: Sample Rogo Performance vs. ChatGPT



Create a table summarizing the analyst questions from Cava's Q3 earnings call. Filters

### Analyst Questions from CAVA's Q3 2023 Earnings Call

| Analyst        | Question Summary  | Source |
|----------------|---|--------|
| Jon Tower      | Inquired about potential missed customer revenue due to store busyness and inaccurate digital pickup times. | 3      |
| Jon Tower      | Asked about CAVA's strategy to attract new customers in a competitive environment with low brand awareness. | 7      |
| Matthew Curtis | Questioned the outlook for commodity inflation in Q4 and preliminary thoughts for 2024.                     | 6      |
| Matthew Curtis | Inquired about the performance (sales and profitability) of the class of 2023 openings.                     | 6      |
| Jon Tower      | Asked if the steak will be a permanent menu item or limited-time offer and clarification on Q4 guidance.    | 8      |
| Andrew Barish  | Clarified the implications of reported year-to-date results on Q4 same-store sales projections.             | 10     |

[Export Table](#)

**Additional Information**

The questions from analysts during CAVA's Q3 2023 earnings call provide insights into areas of interest and concern, such as operational efficiency, growth and expansion strategy, commodity inflation outlook, and financial performance projections. These questions reflect the analysts' efforts to understand CAVA's ability to sustain growth, manage costs, and enhance profitability amidst a dynamic market environment.

Rogo pulls the correct earnings transcript, directly answers the question and provides clear citations



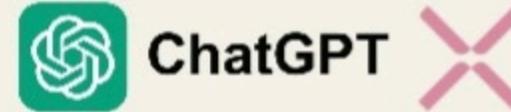
**You**  
Create a table summarizing analyst questions from Cava's Q3 2023 earnings call

**ChatGPT**  
The CAVA Group's Q3 2023 earnings call highlighted several key aspects of their performance and future strategies:

- Financial Performance:** CAVA reported a significant increase in revenue, with a 49.5% rise from the previous year, reaching \$173.8 million. This growth was driven by a 14.1% increase in same-restaurant sales and a 7.6% increase in traffic. The company opened 11 new restaurants during this quarter, expanding their total count to 290. Their adjusted EBITDA was \$19.8 million, a considerable increase from the previous year, and they reported a net income of \$6.8 million.
- Strategic Pillars:** CAVA emphasized three strategic pillars in their growth plan:
  - Brand Solidification:** They are focusing on expanding their Mediterranean brand, with plans to open new restaurants in various states and enter the Chicago market in 2024.

ChatGPT fails to answer the question and doesn't link to any sources.

# Filings: Sample Rogo Performance vs. ChatGPT



find snowflake nrr in filings

Filters

## Snowflake's Net Revenue Retention Rate (NRR) in Filings

### Overview

Snowflake's Net Revenue Retention Rate (NRR) is a crucial metric for understanding the company's business health, especially in terms of its customer growth and platform usage expansion. The NRR is calculated based on the growth in use of the platform by existing customers and is pivotal for gauging future growth prospects.

### NRR in Recent Filings

The table below summarizes the Net Revenue Retention Rate as reported in recent Snowflake filings:

| Filing Period Ending | Net Revenue Retention Rate | Source             |
|----------------------|----------------------------|--------------------|
| April 30, 2023       | 151%                       | <a href="#">2</a>  |
| July 31, 2023        | 142%                       | <a href="#">11</a> |
| October 31, 2023     | 135%                       | <a href="#">12</a> |

Export Table



ChatGPT 4



You

find snowflake nrr in filings



ChatGPT

To find Snowflake's Net Revenue Retention (NRR) in its filings, you should use the SEC's EDGAR search tool. You can search for Snowflake's filings by entering the company's official name or ticker symbol into the search field on the EDGAR Company Filings page. This tool allows you to access a comprehensive database of financial documents that Snowflake has filed with the SEC, where you can find detailed information on their NRR among other financial metrics [\[1\]](#).

To keep exploring, check out these [search results](#).

Rogo pulls the correct metrics from filings, directly answers the question and provides clear citations

ChatGPT cannot figure out how to find the data and instead refers the user to a different tool

「Thank you.」

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