

Document IQ

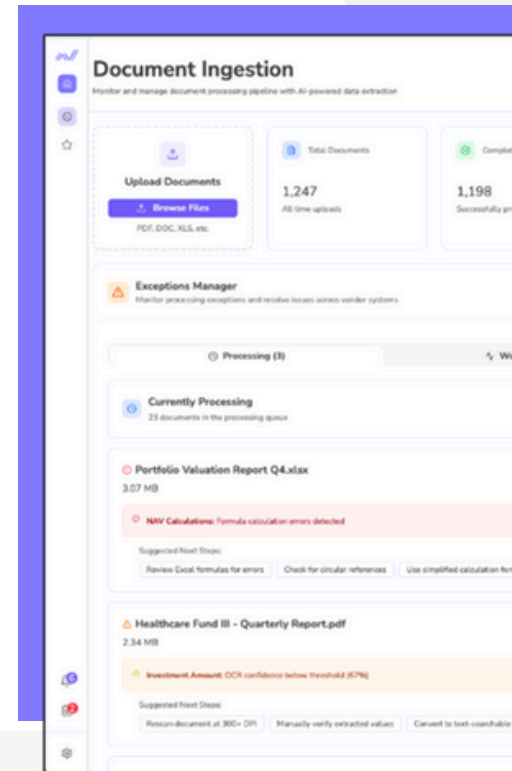
Automate financial operations with AI-powered data extraction and integration

Challenge

Private market firms are burdened by manual data extraction from complex, non-standardized documents. This slows decision-making, adds risk, and diverts investment teams from strategic analysis. As credit markets and electronic loan trading expand, fast access to clean, structured data is critical for efficient operations.

Solution

Document IQ ingests data from financial documents using AI, structures it, and injects it directly into your templates, workflows, and systems. This streamlines financial spreading, portfolio monitoring, and investment operations, enhances efficiency and risk management, and frees investment analysts to focus on strategic, higher-value work.



Automating financial operations

Document IQ is part of Allvue's expanding AI offering. It provides a growing number of pre-built, tested integrations between Allvue applications and a network of best-in-class providers.

- ✓ Purpose-built for private markets
- ✓ Enterprise-grade security and compliance
- ✓ Flexible deployment and managed services
- ✓ Rapid implementation with minimal disruption
- ✓ Scalable architecture supports evolving needs

Allvue + Claira: From credit financials to credit workflows

Allvue's integration with Claira ingests credit financial statements, extracts and normalizes dozens of key data points, and populates data directly to your systems. AI/ML technology and human-in-the-loop controls transform static documentation into actionable intelligence.

Unlock data efficiency, accuracy, and insights

Andi Document Extraction streamlines and automates credit operations by eliminating manual data collection, aggregation, standardization, and entry.



OPTIMIZED EFFICIENCY

Frees investment teams to focus on high-value activities.



ACCURATE DATA

AI/ML-backed quality checks and human-in-the-loop review.



AUTOMATED INTELLIGENCE

AI/ML parses complex documents to extract insights.



SEAMLESS INTEGRATION

Extracted data flows seamlessly into your existing templates, processes, and systems.



BUILT-IN SCALABILITY

Flexible deployment options support your evolving needs and document volumes.



MANAGED SERVICES OPTION

We manage setup, validation, and exceptions, with 24-hour turnaround time SLAs.

How Document IQ works

Upload issuer financials to the user-friendly portal

Key data points are mapped, extracted, and validated

Structured data flows into your templates and systems

Users can run calculations before releasing data



Why Allvue

Allvue is making private markets more efficient with its suite of AI solutions, including Andi Insights, Document IQ, and Agentic Workflows.

LEARN MORE

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