POWERING YOUR BEST WORK — EVERY DAY

mool.ai

mool.ai Quick Start Guide

mool.ai

why we exist

You’re not just gathering data — you’re shaping multi-million dollar decisions.

Yet investment teams waste precious hours:

- Switching between tools
- Extracting scattered insights
- Assembling outputs manually

mool.ai exists to change that.

We help you focus on strategic thinking, decision-making, and building relationships, while AI streamlines research and analysis.

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what you can do with mool.ai

Use mool.ai to create institutional-grade deliverables in minutes:

- Equity Research Reports
- Financial Models & Databooks
- Market Trend & Sector Reports
- Credit Analysis and Underwriting
- Investment Memos and Portfolio Updates

It’s your full-stack thinking platform — backed by powerful, skilled AI.

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what makes mool.ai different

Structured Playbooks:
Pre-built workflows that reflect how professionals work (not just chat-based AI)

Clarity + Depth:
Multi-step, transparent AI that shows how it thinks — from planning to synthesis

Enterprise-Ready:
Bank-grade compliance, audit trails, secure file handling, and export-ready formats

Outcome First:
We don’t just give you content — we give you client-ready deliverables

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who benefits from mool.ai

High-performance and front office teams in institutional finance:

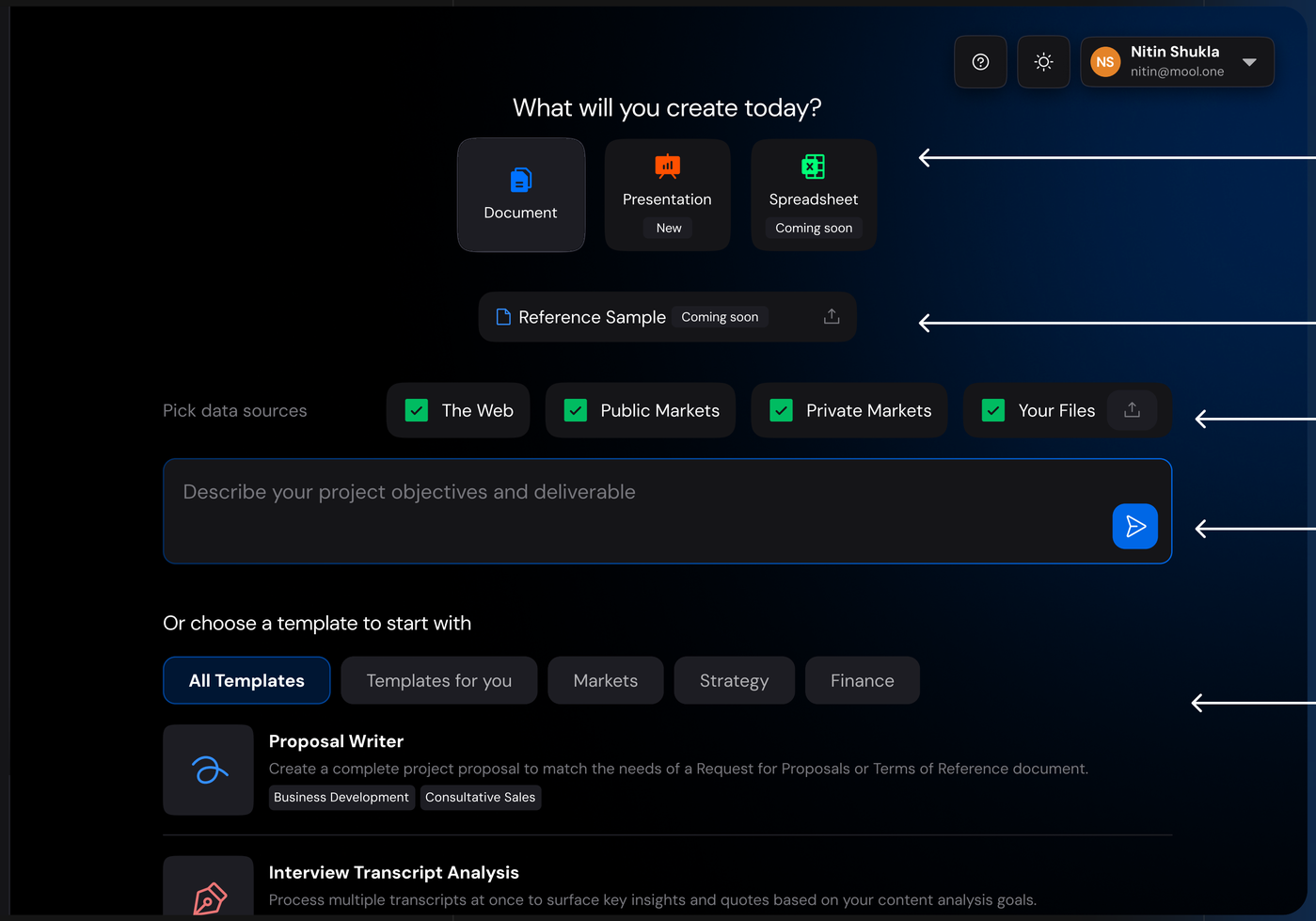
- Public Market Investors
- Brokerage & Research Teams
- Private Equity and Venture Capital
- Credit Issuers
- Strategy & Corporate Development Teams

If your job depends on structured insights and high-quality outputs — mool is made for you.

Value Proposition

mool.ai

Streamline Research, Analysis and Deliverable Creation



Go Beyond Text
Create vertical documents, slides, infographics and more

Match Style & Substance
Provide a sample to re-create a familiar deliverable in a fresh context

Integrate Internal & External Data
Control sources of reference at every step

No Prompt Engineering
Generate 100 Page+ outputs with a short phrase or simple instruction

Specialised Workflows
Can be customised with next day turn around for a new use case

Impact

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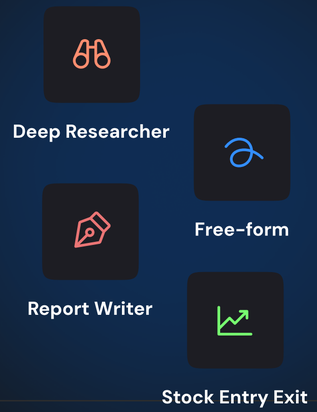
Projects re-worked from **months** to **minutes**

40 hour work week — 30 minutes draft analysis

Day one — Ready with comprehensive insights

Same team size — 3x coverage

Powerful Templates
for every use-case



WHERE MOOL.AI FITS

Workspace between data sources and deliverables as living documents

Connects to your tools and data (e.g., Capital IQ, MS Teams, internal databases)

Create documents with industry-specific playbooks and firm-styled templates

HIGH QUALITY WORK FOR PROFESSIONAL TEAMS

Analysts
Cover entire markets

Advisors
Start with deep insights

Investors
Get to diligence faster

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Integrated with Global Data Coverage

Public Markets

250+ Exchanges

- Profile
- Price & Volume
- Earnings
- Financial Statements
- Fundamentals
- Technicals
- Analyst Estimates
- Institutional Holders

Private Markets

20 Mn Private Company Entities

- Sector
- Funding Rounds
- Valuation
- Investors
- Financials
- Competitors

Unstructured

- Web
  - Highlights
  - Full Text
  - PDFs
- Files
  - Cloud Drives
  - Uploads
  - All File Formats

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Multistep Reasoning with compound flows

Templates

Company Profile
A comprehensive card set designed to provide detailed overviews of a company's management, business models, industry position, financial performance, corporate actions, and news.
Investment Research | Target Screening | Corporate Due Diligence | Competitive Research

Earnings Update
A reliable template for the latest updates on a public company in the context of their most recent earnings. Useful for revising fundamental perspectives in context of performance and strategic initiatives.
Portfolio Monitoring | Investor Relations | Management Consulting | M&A and Strategic Initiatives

Financial Statement Analysis
A detailed guide for conducting an exhaustive financial statement analysis, tailored for professionals seeking to evaluate a company's financial health and investment potential.
Financial Analysis | Ratio and Trend Analysis | Portfolio Monitoring | Valuation

Market Sizing
Get up to speed on new markets by understanding their size, contours, players, and trends.
Market Research | Business Consulting | Strategy | Marketing

Preliminary Diligence
Review available information on an entity against key diligence checks on ownership, risks, and sanctions. Currently in Beta.
Target Screening | Risk Identification | Corporate Due Diligence

Deep Researcher
A foundational template for holistically examining a topic or entity. Creates up to 50 cards over 15 minutes by asking relevant sub-questions and reflecting on the answers to produce a comprehensive briefing.
Holistic Desk Research | Knowledge Mapping | Deep Dives | Problem Solving

Proposal Writer
An intelligent template designed to create comprehensive proposals based on specific requests for proposals (RFPs). It analyzes the requirements outlined in the RFP and generates a tailored proposal that includes relevant data, project plans, and cost estimates. Ideal for businesses looking to streamline their proposal process and improve their chances of winning contracts.
Project Proposals | Contract bids | Firm Quals | Grant Applications

Sample Live User Queries

Figma since Adobe acquisition cancelled

KFin Technologies Ltd (NSE: KFINTECH), Products & Services, Patents, Clientele, Order Book

Palantir Technologies (PLTR) Shareholding Pattern

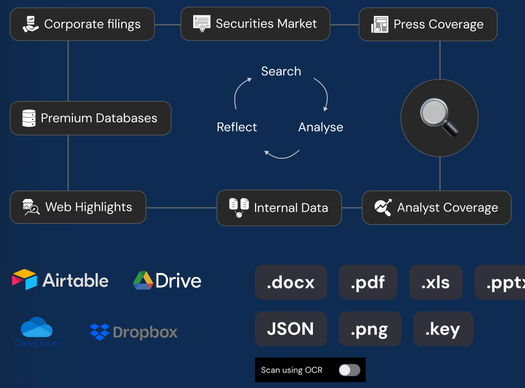
Provide NEC with a detailed and actionable landscape analysis of biometrics technology, focusing on market trends, competitive positioning, and patent insights

Major players in the EV and battery swapping space and their competitive positioning.

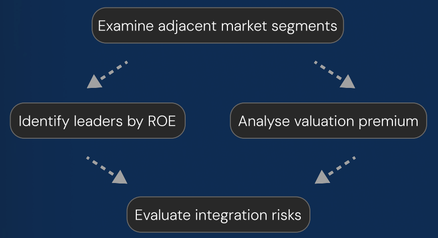
Interpret survey responses for YouTube Sellers Program and create 10 slides with insights

Respond to this RFP for IFC study on AI adoption in financial services, use cases, policy environment, and risks

Infinite Context



Fast Logical Flows



5-10 minutes

Final Fact-Checked Report

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Guided Walkthrough

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Key Templates to know

Analyst — Investment research, earnings reports, financial modeling

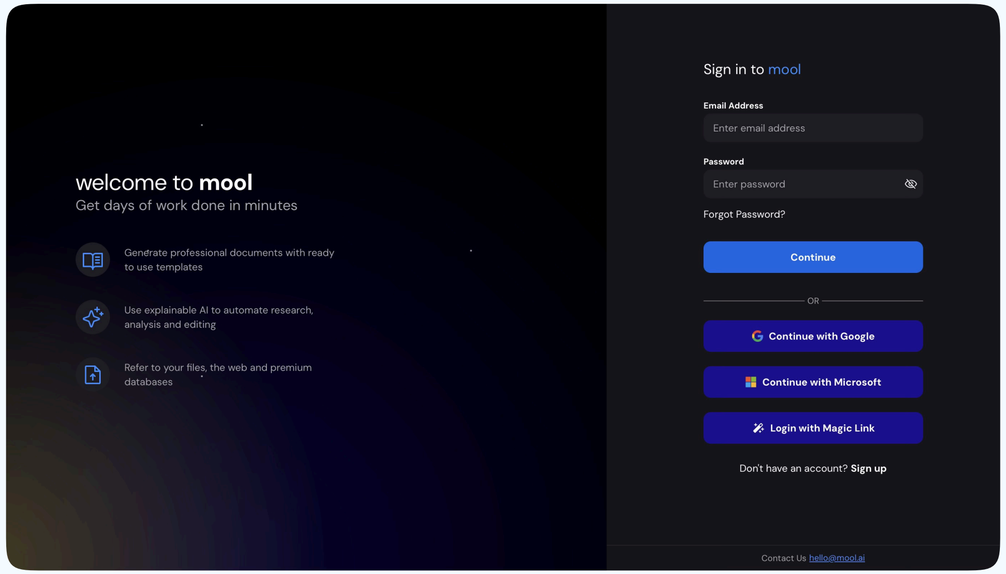
Associate — Company and sector deep dives, Pre-IPO analysis

Financial Extractor — Turn PDFs and unstructured data into Excel ready databooks

Credit Summary — Credit note generation based on filings and raw inputs — includes risk factors, ratios, red flags

Board Summary — Summarizes governance documents, extracts resolutions, highlights strategic themes & action items

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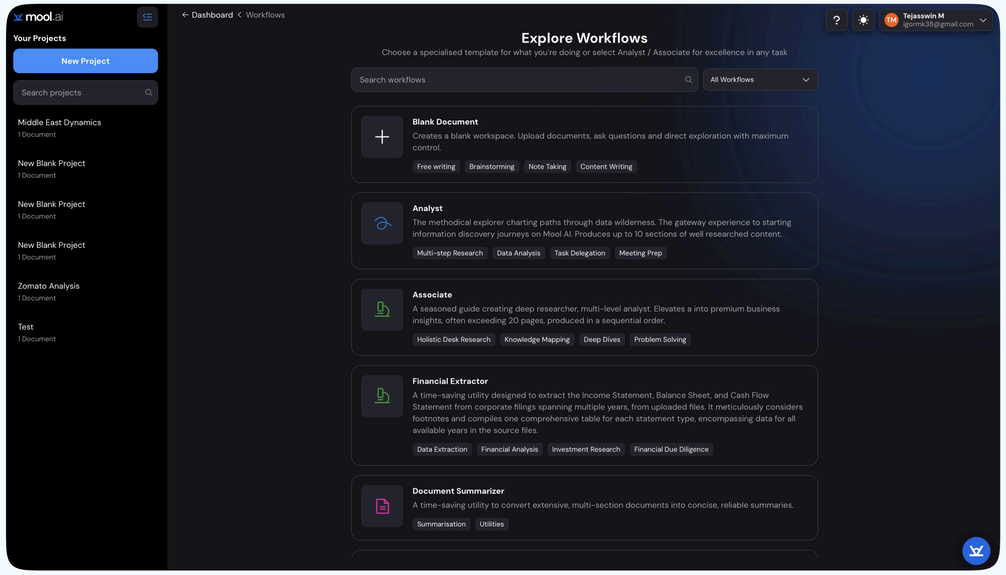
Login & Dashboard Overview

1. Getting started is simple.
    a. Visit https://app.mool.ai/login
    b. Login with your work email (no credit card needed)
    c. You'll land on your Dashboard — this is your control center.

2. From here, you can:
    - Start a new document or presentation
    - Browse templates by clicking Explore Workflows
    - View your past projects and shared canvases

3. You're one click away from creating something powerful.

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Choose the right workflow

1. Start by selecting the right template for your goal.

    a. Click Explore Workflows

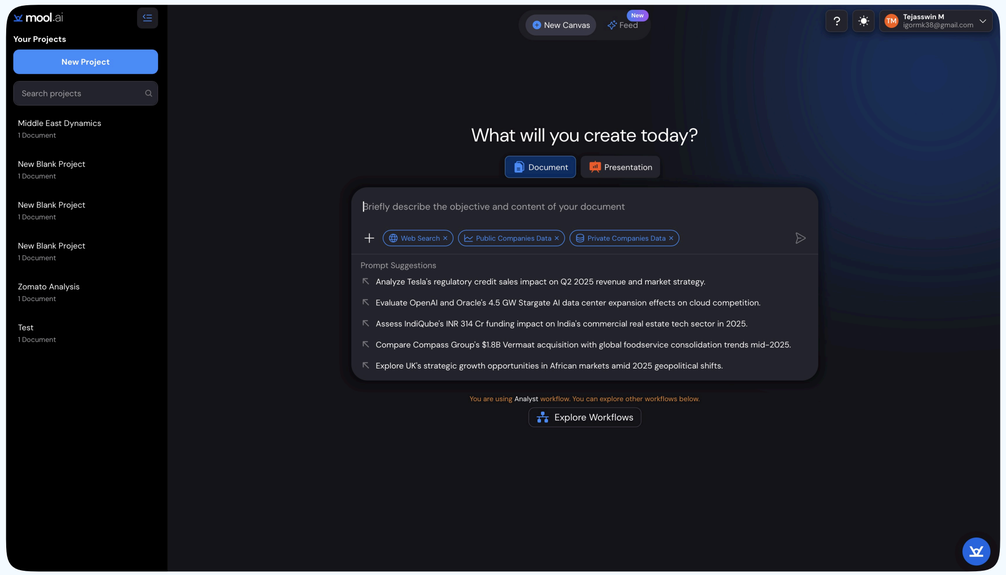
    b. Browse templates like:

        - Analyst (general research)
        - Financial Extractor (databooks)
        - Report Writer (structured reports)
        - Proposal Writer (RFPs)

    c. Click Document or Presentation based on what you want to produce.

2. Templates are designed for real work — not one-size-fits-all outputs.

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Writing your Prompt

1. Now, describe what you want to create.

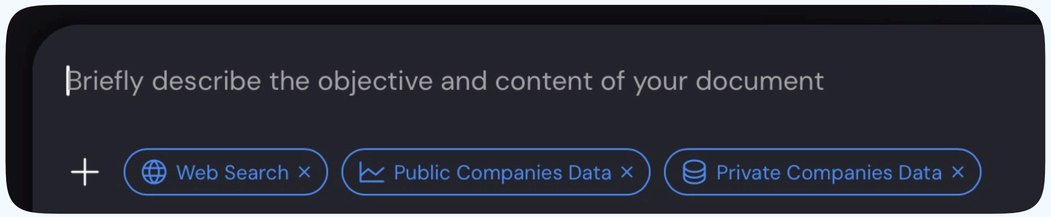
   - Keep it clear, focused, and specific.

     Example: “Create a competitive landscape for EV battery startups in Europe.”
   - You can also pick from pre-written prompt suggestions.
   - Want to control the sources? Add tags like:

     Web Search · Public Companies Data · Private Companies Data

2. The better your prompt, the sharper your output.

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Smart Tags & Prompt Controls

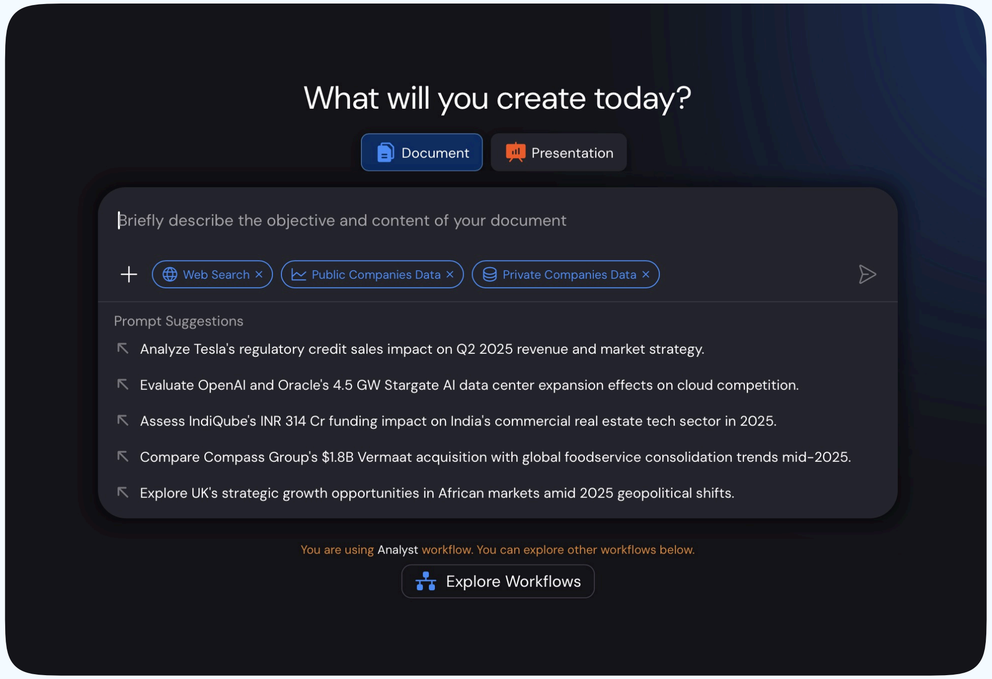
Use prompt tags to guide your AI assistant.

- Web Search: Pulls from the public web
- Public Companies Data: Adds official filings, earnings, etc.
- Private Companies Data: Includes insights on startups, funding, growth

You can add multiple tags to steer the direction of your research.

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Start here

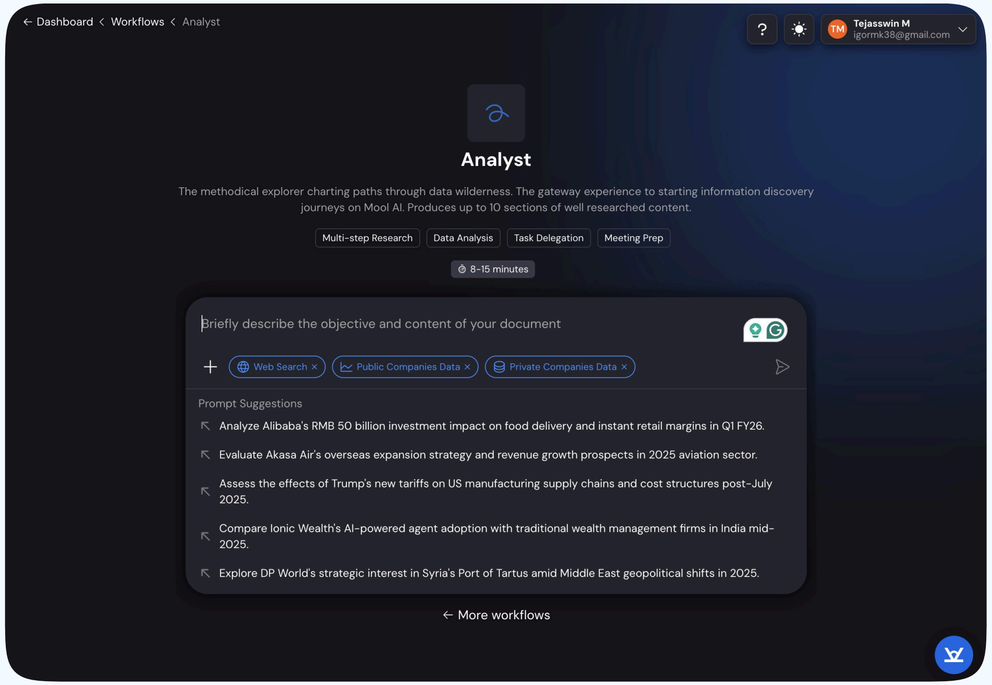


1. **Click “Explore Workflows”**
   You’ll see templates like: Analyst, Financial Extractor, Report Writer, etc.

2. **Pick the right workflow for your task; e.g.**
   - Want a databook? → Use Financial Extractor
   - Creating a strategy memo? → Use Analyst

3. **Then click Document or Presentation**
   Based on what you want as an output.

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Here's what to do...

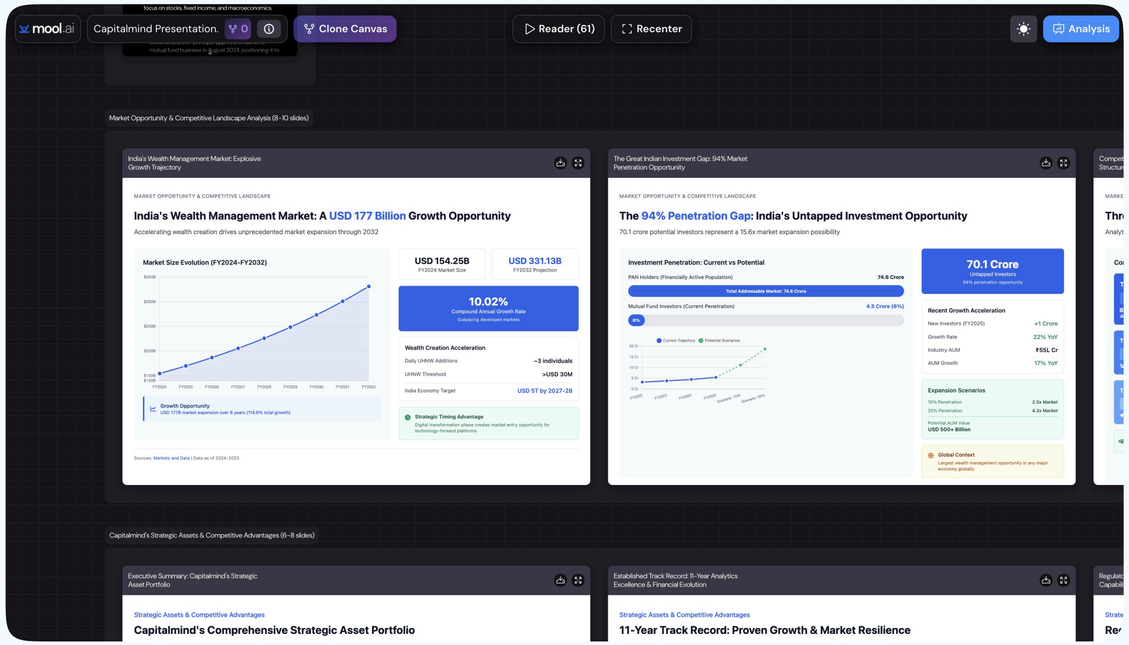
1. **Confirm you've selected the right workflow**
   You're now inside the Analyst template — built for research, exploration, and general insights.

2. **Enter your topic in the input box**
   E.g., "Analyze India's edtech market recovery in 2025"

3. **Pick your data sources**
   Select/Unselect from Web Search, Public Companies, Private Companies, etc.

4. **Or choose from prompt suggestions**
   Don't want to type? Just click on a smart prompt to get started instantly.

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Explore the Canvas...

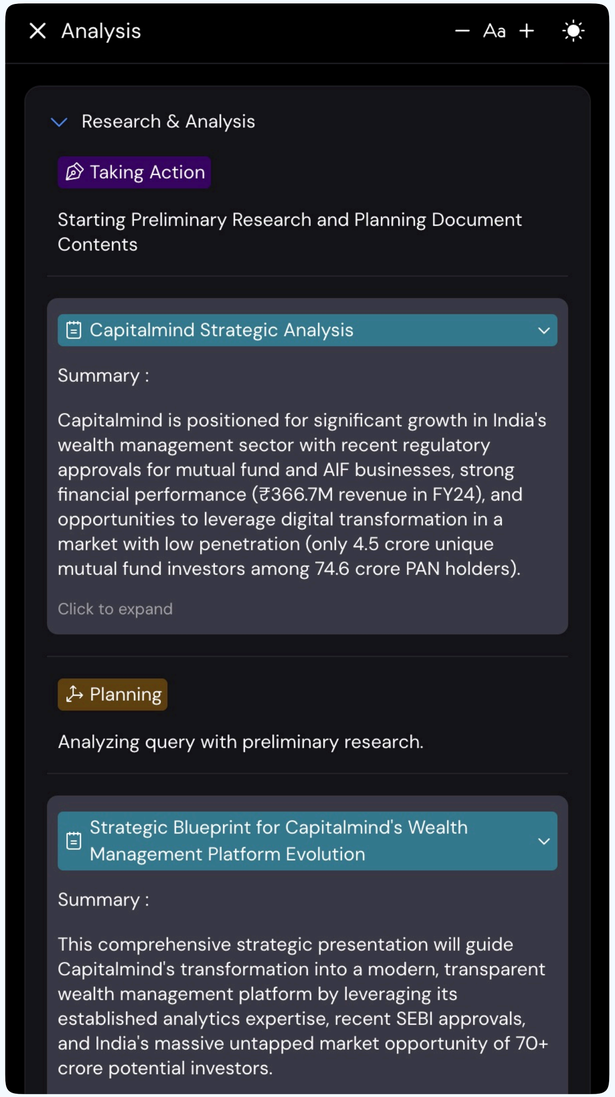
1. **This is your Canvas**
   All your research is broken down into smart, editable cards.

2. **Scroll in any direction**
   Because your thinking isn't linear — this layout lets you zoom out, rearrange, and make connections.

3. **Click any card to edit, expand, or add more**
   Change wording, add sections, or build new logic right inside the flow.

4. **With the canvas, you can:**
   - Scroll sideways to see the full picture
   - Expand, edit, or add new cards
   - Structure your document the way your mind works

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The Analysis Tab

1. **The Analysis Tab shows your AI's thinking process**
   Every step — Planning, Investigating, Synthesizing — is documented and visible.

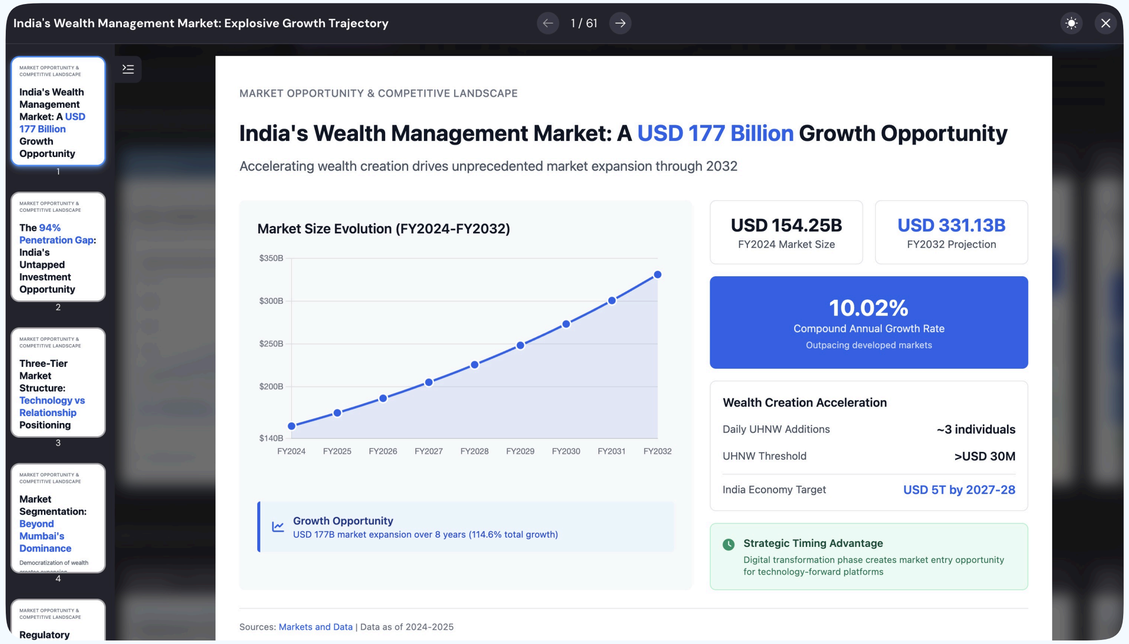
2. **Each insight is trackable**
   Whether it's a key summary, data extraction, or hypothesis — you'll see how it came to be.

3. **No black-box outputs**
   You stay in control with a clear view of what's been done, what's in progress, and what's next.

4. **Click into any step to expand or add more context**

   Edit, continue research, or feed it into your document.

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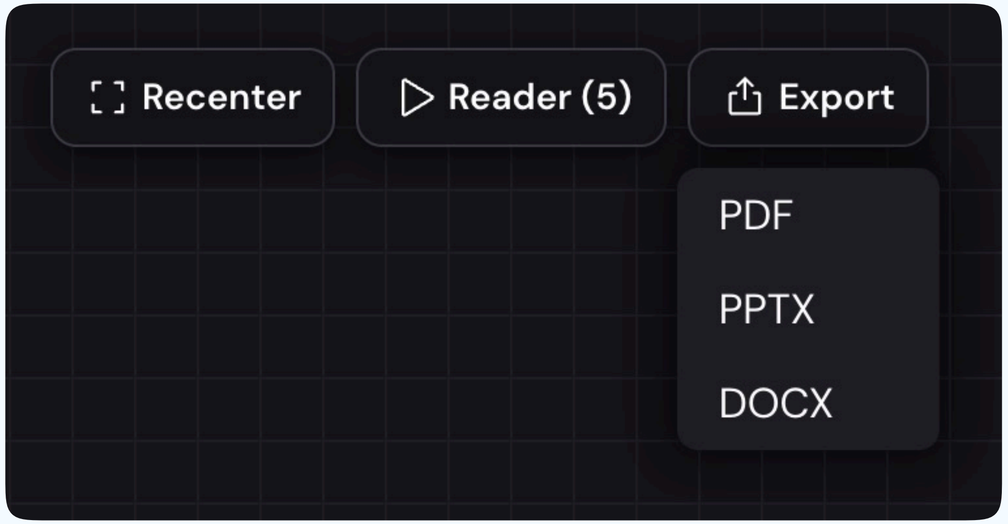
Reader Mode

1. **See your entire report — one card at a time**
   A clean, vertical reading mode that makes long reports easier to follow.

2. **Navigate with ease using the side index**
   Jump between sections without losing context.

3. **Perfect for review, presentations, or internal walkthroughs**
   Read like a document. Navigate like a deck.

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Export in any Format

When your document is ready, export it with a single click.

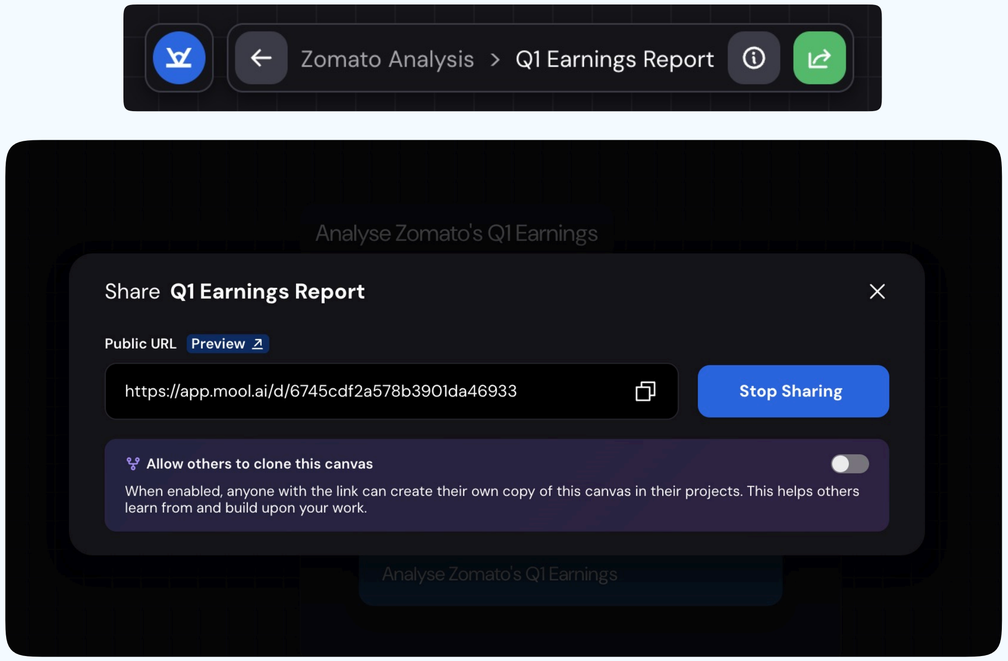
Supported formats

1. Word (.docx) – for structured reports
2. PDF – for read-only sharing
3. PowerPoint (.pptx) – coming soon for visual presentations

All exports come

1. Clean and styled
2. With source links & footnotes
3. Ready to share with clients, managers, or partners

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Share with Team Members or Clients

Mool.ai is built for collaborative teams.

You can

Share via link – View-only or editable

Invite collaborators – Comment, edit, expand

Work across time zones – Seamless async collaboration

Research isn't static — mool lets your team stay aligned.

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sample prompts to try

1. **Company Profile**

   Create a company profile of Zomato Ltd. covering its business model, revenue by segment, customer and merchant base, delivery footprint, leadership, 3-year financials, growth initiatives, and market positioning.

2. **Valuation**

   Value Honasa Consumer Ltd. (Mamaearth) using DCF and trading multiples. Include key assumptions—revenue growth, ad spend, margin profile—and present a valuation range across scenarios.

3. **Peer Analysis**

   Compare Aether Industries Ltd. with 5 specialty chemical peers matched on size and product mix. Benchmark revenue composition, margins, capex intensity, and valuation multiples.

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sample prompts to try

4. **Market Sizing**

   Estimate the B2B logistics platform market in India (2025–2030), factoring in fleet digitization, SME adoption, shipment pricing, volume growth, and total addressable market. Highlight short-term demand drivers.

5. **Databook**

   Compile a 10-year consolidated financial view for Nazara Technologies Ltd., covering full financial statements, segment-wise performance, and key operating metrics.

6. **Due Diligence**

   Review 5-year financial model for a B2B SaaS business. Check assumptions, revenue drivers, historical alignment, and model structure. Flag gaps and recommend fixes.

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sample prompts to try

7. **Interview Transcripts**

   Analyze interview transcripts from the FreshGlow D2C skincare launch survey. Extract themes, sentiment, feedback, and improvement areas for product and CX teams.

8. **Board Meeting Summary**

   Summarize board meeting transcripts with focus on key attendees, strategic decisions, financial and operational updates, approvals, dissent (if any), and assigned action items.

9. **Credit Proposal Summary**

   Summarize credit proposals with borrower background, loan purpose, terms, financial health, collateral, risks, and approval conditions.

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Experience the Change