

CHECKLIST

Ai Tools for Risk Assessment in Investments

Implementing AI-powered investment risk assessment

- 1 Audit your current risk workflow and identify missing AI tools by name.
- 2 Calculate the true labor cost of your manual risk assessment process today.
- 3 Run a 30-day pilot with at least one AI risk tool alongside current methods.
- 4 Select and integrate a real-time AI risk feed (Dataminr, Predata, or similar).
- 5 Link your chosen AI risk feed to Slack or email for immediate notifications.
- 6 Prioritize AI tools with explainable AI features that show underlying data drivers.
- 7 Compare outputs from two different AI risk platforms head-to-head before committing.
- 8 Evaluate integration compatibility with your existing Bloomberg, Tableau, or Power BI systems.
- 9 Train your team to use AI as augmentation, not replacement, for risk assessment.
- 10 Document and present explainable AI findings to your board and LPs quarterly.
- 11 Establish a monthly review process comparing AI-flagged risks against actual market outcomes.