

# 2 million+

Over **2 million** investment models are built/reviewed every week

# 60%

Only **60%** of the build/review workflow can be reliably augmented with AI

# 40%

For the remaining **40%**, the potential risks outweigh the benefits of using AI

Fontics solves this, providing speed without trading off accuracy

With Fontics, you can run the **40%** workflow **10x** faster in Excel, **without AI**

# Investment Modelling Workflow

60%

40%

## Data Analysis and Model Scaffolding

## Deal Structuring and Model Assurance

### Data Analysis

### Model Scaffolding

### Deal Structuring

### Model Assurance

Data  
Integration

Data  
Processing

Formula  
Buildup

Model  
Development

Structuring

Solvers

Risk Analysis

Model Review

Bloomberg  
Capital IQ  
FactSet

Pivot Tables  
Seasonality  
Trend

Complex Lookups  
Dynamic Arrays  
Lambdas

IS, CF, BS  
DCF, LBO, PF  
Debt Sculpting

Scenarios  
Sensitivity  
Optimization

Goal Seek  
Breakeven  
Factor Solvers

Stress Tests  
Deal Drivers  
Monte Carlo

Financial Review  
Model Audit  
Visualizations

Best augmented **with AI**

Best augmented **without AI**

**Claude\*** can automate up to 90%

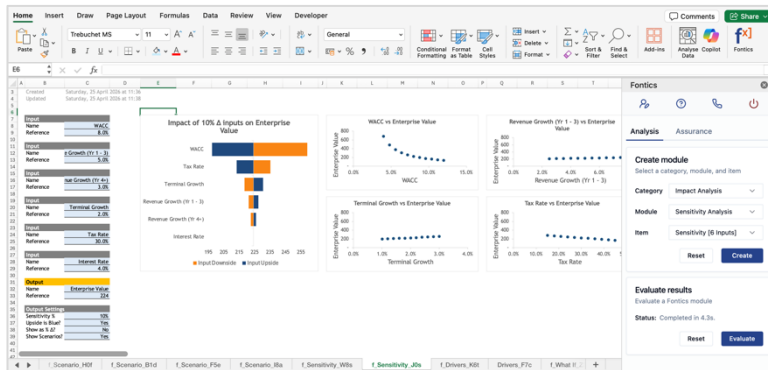
**Fontics\*** can automate up to 90%

\*Claude and other AI-for-Excel tools

\*<https://fontics.com>



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## Highlights

### With Fontics you can:

- ✓ Run 10 scenarios in any model in seconds
- ✓ Map the 3 to 5 drivers of any deal in seconds
- ✓ Run stress tests in any model in seconds
- ✓ Refine complex deal structures in minutes
- ✓ Audit a 50-sheet model in minutes

## Leverage

- ✓ Setup and run your first analysis within 2 minutes
- ✓ Intuitive interface, no special training required
- ✓ Integrates with any Excel model instantly
- ✓ 85% of modules evaluate within 5 seconds

## Modules\*

### Scenario Modelling

- ✓ Scenario Analysis
- ✓ Scenario Optimization

### Sensitivity Analysis

- ✓ Data Tables
- ✓ Tornado Charts

### What-If Analysis

- ✓ Dynamic Goal Seek
- ✓ Multi-Factor Solvers

### Monte Carlo Simulation

- ✓ 20+ Distributions
- ✓ 5,000+ Scenarios

### Transaction Review

- ✓ Pareto Drivers
- ✓ Football Field Analysis

### Financial Review

- ✓ Visualize Financials
- ✓ Sense-Check Financials

### Model Audits

- ✓ Smart Trace
- ✓ Formula Audits

### Modules are optimized for

Investment Banking

Private Equity

Real Estate

Project Finance

Private Credit

Equity Research

*\*All modules (except Monte Carlo) run 100% locally*

## Pricing\*\*

### Focused

For High-Level Investment Reviews and Corporate Strategy Teams.

**\$10** /month

- ✓ 3 Variable Drivers
- ✓ 50 Requests/Day
- ✓ With Monte Carlo: +\$5/month

### Transactions

For Lower Middle Market, Search Funds and Real Estate Deals.

**\$25** /month

- ✓ 6 Variable Drivers
- ✓ 100 Requests/Day
- ✓ With Monte Carlo: +\$10/month

### Institutional

For [Upper] Middle Market, Large-Cap and Private Credit Deals.

**\$50** /month

- ✓ 12 Variable Drivers
- ✓ Unlimited Requests/Day
- ✓ With Monte Carlo: +\$15/month

*\*\*20% discount for annual plans*