



Thematic Investing

AI-Powered Portfolio Construction



Solution Overview

MarketPsych's Thematic Investing tool accelerates idea generation and basket creation by mapping companies to themes—innovation trends, accounting factors, and ESG issues—across 1,000+ topics as well as user-defined search terms.

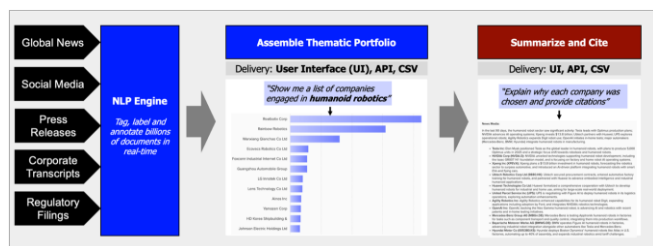


Figure: A view of the thematic workflow, from content collection through AI summarization

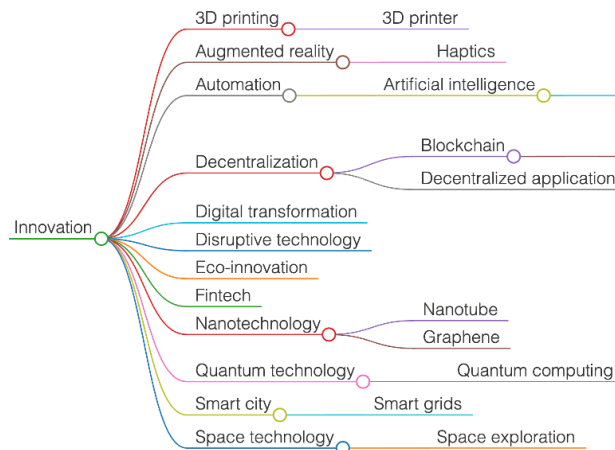


Figure: A partial view of the pre-defined "Innovation" taxonomy (sample cluster tree). These themes plus 1,000 more are available for thematic search.

Key Features

Rapid Basket Creation

Assemble portfolios in seconds from unstructured text

Precision Filters

Narrow results by sentiment, sector, listing venue, HQ country, private vs. public, language, or source region.

Transparent Evidence

Every data point links back to original articles; sentences are viewable in-app.

AI Summaries

One-click bullet summaries of supporting content (see Fig. 2)

Flexible Ranking

- **Buzz-Ranked:** total theme mentions.
- **Relevance-Ranked:** % of a company's coverage tied to the theme (see Fig. 3).

How it Works

Step	Process	Key Points
1. Real-Time Ingestion	News, social, filings, press releases, transcripts (20+ languages)	Public + licensed sources
2. NLP Tagging	Same engine that powers Yahoo! Finance & iPhone Finance App	Labels entities, topics, sentiment, & events
3. Matching Theme	User-defined or library themes (e.g., quantum computing, reforestation)	1,000+ curated clusters
4. Basket Assembly	Buzz-ranked or relevance-ranked company lists	CSV download or API
5. Review & Export	Inspect source sentences, AI bullet summaries, links	UI filter + export to Excel/CSV

Primary Use Cases

Role	Challenge	Thematic Tool Benefit
Portfolio Manager	Track emerging tech companies or supply chains	Automatically build and rebalance thematic baskets
Quant Researcher	Data-driven factor construction	Receive a feed of thematic scores & sentiment for every company
ESG Analyst	Monitor controversies & green revenue	Filter by ESG topic cluster + sentiment
Thematic Indices and ETF Issuers	Index methodology validation	Transparent evidence for inclusion rules

Workflow Example: "Humanoid Robot" Theme

1. **Search Library** → Select *Humanoid Robot* cluster.
2. **Apply Filters** → Public companies, ≥ USD 1 B mkt cap, HQ in Asia.
3. **View Results** → Relevance-ranked list with tickers.
4. **Inspect Sources** → Single-click to read citations; AI summary auto-generated.
5. **Download CSV** → Import into trading or back-testing platform.

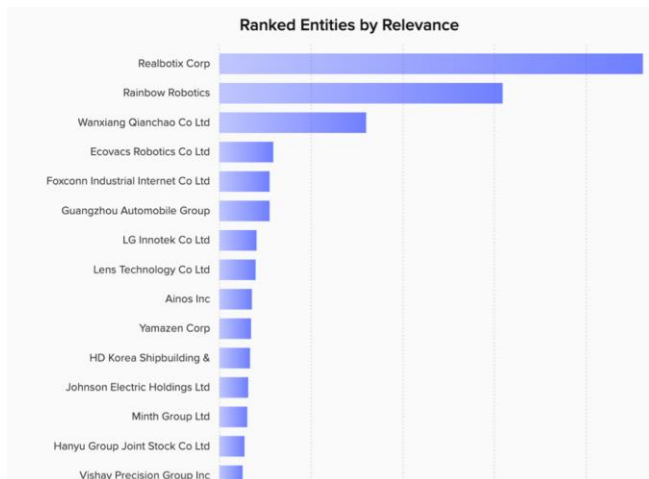


Figure: Screenshot of relevance-ranked companies

News Media:

In the last 90 days, the humanoid robot sector saw significant activity: Tesla leads with Optimus production plans; NVIDIA advances AI operating systems; Xpeng invests \$13.8 billion; Utech partners with Huawei; UPS explores operational robots; Agility Robotics expands Digit robot use; OpenAI initiates in-home tests; major automakers (Mercedes-Benz, BMW, Hyundai) integrate humanoid robots in manufacturing.

- **Tesla Inc:** Elon Musk positioned Tesla as the global leader in humanoid robots, with plans to produce 5,000 Optimus units in 2025 and a strategic focus shift towards robotaxis and humanoid robots.
- **NVIDIA Corp (NVDA.O):** NVIDIA unveiled technologies supporting humanoid robot development, including the Isaac GR00T N1 foundation model, and is focusing on factory and home robot AI operating systems.
- **Xpeng Inc (XPEV.K):** Xpeng plans a \$13.8 billion investment in humanoid robots, forecasting the robotics sector to surpass automotive, and introduced an AI-driven platform integrating humanoid robots with smart EVs and flying cars.
- **Utech Robotics Corp Ltd (9880.HK):** Utech secured procurement contracts, entered automotive factory training for humanoid robots, and partnered with Huawei to advance embodied intelligence and industrial humanoid applications.
- **Huawei Technologies Co Ltd:** Huawei formalized a comprehensive cooperation with Utech to develop humanoid robots for industrial and home use, aiming for large-scale real-world deployment.
- **United Parcel Service Inc (UPS):** UPS is negotiating with Figure AI to deploy humanoid robots in its logistics operations, exploring automation enhancements.
- **Agility Robotics Inc:** Agility Robotics enhanced capabilities for its humanoid robot Digit, expanding applications including adoption by Ford, and integrates NVIDIA's robotics technologies.
- **OpenAI Inc:** OpenAI, backing the Neo Gamma humanoid robot, is advancing AI and robotics with recent patents and in-home testing initiatives.
- **Mercedes-Benz Group AG (MBGn.DE):** Mercedes-Benz is testing Aptronik humanoid robots in factories for tasks such as component transport and quality control, integrating them into production workflows.
- **Bayerische Motoren Werke AG (BMWG.DE):** BMW operates Figure AI humanoid robots in factories, advancing industrial robot integration alongside other automakers like Tesla and Mercedes-Benz.
- **Hyundai Motor Co (005380.KS):** Hyundai deploys Boston Dynamics' humanoid robots like Atlas in U.S. factories, automating up to 40% of assembly, and expands industrial robotics amid tariff challenges.

Figure: AI bullet-point summaries describing the roles of the most commonly discussed companies related to the “Humanoid Robot” theme.

Competitive Advantages

Breadth & Depth

20 + languages of media scanned in real-time, 1,000 + themes labelled

Proven Text Tagging Engine

Production-tested by global platforms with data clients in 25+ countries.

Explainability

Source-level transparency and inline citations

Speed to Insight

No coding required; UI or API delivery.

Specifications

Feature	Detail
Refresh Rate	Near real-time (sub-minute)
Delivery	Web UI, CSV, REST API
Ranking Metrics	Buzz, Relevance, Sentiment score
Export Formats	CSV, JSON, XLSX
Supported Languages	20 + (auto-detected & translated)

Next Steps

1. **Book a Demo** – See live theme screening in action.
2. **Trial Access** – Two-week sandbox with full UI and CSV export.
3. **Integration** – Connect API endpoints to analytics or trading systems.