

Artificial Intelligence meets Private Asset Portfolio Management with iLEVEL Document Search from S&P Global Market Intelligence

Private market portfolio insights and decision-making enhanced through advanced AI-powered document queries

iLEVEL Document Search enables users to query comprehensive investment documents, including board decks and financial statements

NEW YORK, Aug. 6, 2025 /PRNewswire/ -- [S&P Global Market Intelligence](#), a provider of information services and solutions to global markets, today announced the launch of iLEVEL Document Search, a new AI-powered search capability that enables private market investment professionals to extract intelligence from investment documents using natural language queries. This innovative tool transforms asset managers' ability to explore and understand the factors that shape portfolio performance, facilitating faster, more informed decisions.



With private equity firms holding record levels of dry powder while existing portfolios remain in a prolonged holding pattern, iLEVEL Document Search addresses the critical need for deeper portfolio intelligence. Users can now query all documents stored in iLEVEL's Document Library, including board decks, quarterly financials, annual financials and fund financials. The tool leverages advanced AI-driven data extraction technology to democratize data by unlocking previously hidden insights and breaking down information silos.

Key capabilities include:

- **Natural Language Querying:** Users can ask open-ended questions about their portfolios, enabling exploration beyond traditional templates or pivot tables.
- **Annotations for Traceability:** All search results include granular annotations linking every data point to original sources.
- **Permissions-Based Search Results for Confidentiality:** Results restrict access based on user credentials, maintaining confidentiality of sensitive materials while delivering a seamless search experience.

"We're moving from an era of portfolio monitoring to one of portfolio intelligence," said **Christopher Sparenberg, Head of iLEVEL, S&P Global Market Intelligence**. "With deal flow at multi-year lows and exit windows tightening, the firms that will thrive are those that can unlock the 'unknown unknowns' in their existing portfolios to create differentiated value. iLEVEL Document Search enables investment teams to discover new opportunities and identify risks to make decisions with conviction."

The launch of iLEVEL Document Search builds on recent enhancements to the platform, including [Automated Data Ingestion](#) and [Capital Structure Analysis](#).

Launched in 2010, iLEVEL is a leading private markets portfolio management solution that helps General Partners and Limited Partners streamline data collection, valuation and reporting workflows, and is leveraged by more than 700 investors to manage their portfolios.

To learn more about iLEVEL Document Search, visit our website [here](#).

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About S&P Global Market Intelligence

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI). S&P Global is the world's foremost provider of credit ratings, benchmarks, analytics and workflow solutions in the global capital, commodity and automotive markets. With every one of our offerings, we help many of the world's leading organizations navigate the economic landscape so they can plan for tomorrow, today.

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