

S&P Global brings together Artificial Intelligence and Private Asset Portfolio Management with iLEVEL Document Search

New AI-powered capability transforms how private market investors surface portfolio intelligence — reinforcing S&P Global's leadership in delivering enterprise-grade GenAI solutions to financial professionals

NEW YORK, Aug. 7, 2025 /PRNewswire/ -- S&P Global (NYSE: SPGI) 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.

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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](#), Covenant Monitoring and Financial Spreading as part of the [iLEVEL Credit](#) solution.

These enhancements represent S&P Global's ongoing commitment to providing a comprehensive suite of solutions to the private markets industry, with offerings spanning private company data, valuations, risk analytics and portfolio management services designed to drive investment and operational alpha.

To learn more about S&P Global's private markets insights and offerings, visit [here](#).

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About S&P Global

S&P Global (NYSE: SPGI) provides Essential Intelligence. We enable governments, businesses and individuals with the right data, expertise and connected technology so that they can make decisions with conviction. From helping our customers assess new investments to guiding them through sustainability and energy transition across supply chains, we unlock new opportunities, solve challenges and Accelerate Progress for the world.

We are widely sought after by many of the world's leading organizations to provide credit ratings, benchmarks, analytics and workflow solutions in the global capital, commodity and automotive markets. With every one of our offerings, we help the world's leading organizations plan for tomorrow, today. For more information, visit www.spglobal.com

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