

Investment Analysis Guide

AXIOM Analysis

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Version 1.0 | April 12, 2026

Purpose

Use the Investment domain when you want AXIOM to stress-test a thesis, map downside, surface fragility, and show what evidence is still missing.

This workflow is strongest when the input already contains:

- the asset or company
 - the core thesis
 - the assumptions doing the heavy lifting
 - the main risks
 - the key unknowns
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Best Starting Settings

Thesis review

- Domain: `Investment`
- Modules: `thesis`
- Report depth: `Standard`
- Engine: `AXIOM Gateway` or `Auto`
- Live sources: `off` if your materials are already uploaded, `on` if external context matters

Risk stress test

- Domain: `Investment`
- Modules: `risk`
- Report depth: `Standard`
- Engine: `Gemini` or `Auto`
- Live sources: `on` when outside market context matters

Broad diligence pass

- Domain: `Investment`
 - Modules: `thesis, risk`
 - Report depth: `Standard first`
 - Engine: `Gemini` or `Auto`
 - Live sources: `on` when you need market or company context checked
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What To Prepare

Before you run the analysis, collect:

- the core thesis
- the time horizon
- what has to go right
- what would break the thesis
- the strongest risks
- the best bull and bear readings
- any supporting financial, market, or operating notes

If you only give AXIOM a slogan like “great company, big market,” the output will stay thin.

Best Input Pattern

The cleanest current pattern is:

1. fill out the intake template
2. upload the intake plus thesis material
3. keep the portal prompt short

This works better than putting everything into one improvised prompt box paragraph.

Good Prompt Pattern

Use the short prompt file and let the uploaded material carry the detail.

Good results usually separate:

- evidence
 - assumptions
 - extrapolation
 - risk
 - missing inputs
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Common Mistakes

- using `fast` when you actually want a real diligence pass
 - turning on live sources when you only want the uploaded memo reviewed
 - forgetting to include invalidation conditions
 - not including the strongest counter-thesis
 - giving conclusions without the evidence base behind them
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Recommended Run Order

1. Start with `Standard`
 2. Use `thesis` or `thesis + risk`
 3. Improve the input if the result feels generic
 4. Only then try `Deep`
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What A Strong Result Should Include

A strong investment report should clearly show:

- the thesis structure
 - the assumptions carrying the view
 - what could invalidate the thesis
 - the major risk concentrations
 - fragility points
 - the most decision-relevant missing evidence
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Related Files

- INVESTMENT_ANALYSIS_INTAKE_TEMPLATE_2026-04-12.md
 - INVESTMENT_ANALYSIS_PROMPT_2026-04-12.txt
 - INVESTMENT_ANALYSIS_EXAMPLE_REQUEST_2026-04-12.txt
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End of Investment Analysis Guide v1.0