Rieda edishan | 2026-11-20

Practical AI fi investment banking

Harbour Think Tank, Caribbean AI Association, under the leadership of Adrian Dunkley | 2026-11-11

Shaata edishan fi riida. Harbour Think Tank, Caribbean AI Association, anda Prezident Adrian Dunkley. Oktoba 2026. Revision 11 November 2026.

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Weh di test fi cover

Start wid diligence requests, document index an timetable. Restrict work to one deal. Separate management statements, verified evidence an open differences. Authorised professionals own pricing, disclosure an closing.

Ten use case fi test

01. Diligence requests. Link each missing document to one question, workstream an decision. Manager remove duplicate requests an compare wid specialist list. If entity or period missing, ask first.

02. Data room. Index identifier, version, entity an permission. Administrator test least-privilege accounts cannot see another mandate.

03. Financial statements. Extract figure, currency, period an qualification wid a source per cell. Compare wid checked values an run reconciliations outside di model.

04. Comparable companies. Fix date an metric definitions, record adjustments. Second analyst recalculate in di reviewed model. Di tool cannot choose a price.

05. Timetable. Map dependencies an critical path. Transaction manager compare wid experienced coordinator’s plan an challenge unsupported deadlines.

06. Disclosure. Map each draft sentence to an approved fact and reviewer. Management verify accuracy, counsel review disclosure.

07. Covenants. Compare exact clause wording, amendments an references. Counsel check against annotated answers an resolve exceptions or meaning.

08. Investor questions. Keep one approved answer per question for consistent information. Issuer an counsel review before release. Hold confidential information back.

09. Deal issues. Separate risk, assumption, issue an dependency for this deal. Only close when di specialist record resolution an evidence.

10. Closing. Order conditions precedent an name who confirm each. Manager sample completed items an inspect actual evidence. Di checklist cannot authorise closing.

Di 90-day test

Day 1–15: pick one task. Name di owner an who can stop di test. Write down di approved source, access, time an error inna di work now. Day 16–45: test hard case an record weh disagree. Check every output an keep di test separate from live work.

Day 46–75: compare like task wid like task. Count di time fi prepare, check an fix. Day 76–90: look pon di serious error dem an decide fi widen, change or stop. Di think tank propose di

workflow an priority dem. Dem never measure result from a company rollout. Di full English paper give di process, duty table, checks an source notes.

Suos dem

[1] Caribbean AI Association. Think Tanks, Harbour remit. Accessed 26 October 2026.

[2] Financial Services Commission, Jamaica. Guidelines for Issuers of Securities, August 2022, SR-GUID-22/08-0002, sections 1–4, 8 and 10.

[3] Financial Services Commission, Jamaica. Market Conduct Guidelines for Securities Dealers, 31 January 2020, sections 4–5.

[4] United States Securities and Exchange Commission. Beginners' Guide to Financial Statement, 4 February 2007; updated 5 February 2007. Financial-statement types, cash flows and notes.

[5] National Institute of Standards and Technology. Artificial Intelligence Risk Management Framework 1.0, 2023, section 5, framework core.

[6] Office of the Information Commissioner, Jamaica. Data Protection Standards. Accessed 26 October 2026.

[7] Agent Skills. Agent Skills Overview. Accessed 10 November 2026.

Dis short edishan go wid di full orijinal ina Inglish.

Inglish edishan (PDF)