

# AI At Work

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Turning Everyday Tasks into Augmented Workflows

TSAM London 2026

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# Important Disclaimers for this Roundtable

As per standard industry practice



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## **Personal Views, Not Employer's**

All opinions expressed are solely my own and do not represent the position of my employer.



## **Brand Neutral — No Endorsements**

AI platforms or brands mentioned are for illustrative purposes only, not an endorsement by my employer or myself.



## **No AI Content**

This presentation and all discussion materials were authored without using any AI platforms or tools

# What Enterprise AI will we discuss?

Level setting this round table

Maximize takeaways with ChatGPT like Enterprise AI Apps only.

# AI at Work : Mindset

Principles when working with AI.

Personal Agency > AI Agents

Adapt AI to You

NOT

You to AI

Probabilistic

TO

Deterministic

# Onboarding into AI : Like Your New Car

30 mins & 3 steps to know your Enterprise AI Platform



## Example Prompts

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### Foundation

- What are the models available?
- When were the models published?
- How was this model trained?

### Access & Tools

- What are your capabilities?
- Can you access files/folders on my device?
- Can you create & execute code?

### Role Specific

- What information do you know about me and my role in the organization ?
- What are the tools ,platforms or data sources can you access to help with tasks in my role?

# Working with AI

Techniques to use during your conversations to get deterministic results

## Roleplay



You are a Senior Technical SEO Consultant with 15+ years auditing enterprise websites. You have seen hundreds of sites lose significant organic traffic from technical issues. You know that severity scores from tools like Screaming Frog, Ahrefs, or Semrush rank issues by technical severity, not by business impact. You are skeptical of any audit that leads with a long list of errors without tying them to traffic or leads generated at risk.

## Think Step By Step



Assess whether this fund's NAV calculation is correct.

Step 1: List each input variable and its source.

Step 2: Show the calculation methodology step by step.

Step 3: State any assumptions you are making.

Step 4: Flag any inputs that appear inconsistent with market data.

Step 5: Give your conclusion with a confidence level (High / Medium / Low).

## Output Format Spec



Give me the output as a table with these exact columns:

Security Name | ISIN | Sector | Weight (%) | Contribution to Return (bps) | Comment  
Sort by contribution to return, descending.  
Keep comments under 15 words each.  
Use 2 decimal places for all percentages.

## Panel Review



Review this investment proposal from three perspectives:

AS THE PORTFOLIO MANAGER: Focus on alpha potential, risk/return profile, and fit within the existing mandate.

AS THE COMPLIANCE OFFICER: Focus on regulatory risk, concentration limits, and disclosure obligations.

AS THE CLIENT RELATIONSHIP MANAGER: Focus on how the client will react, whether it aligns with their stated objectives, and what questions they will ask.

## Force Self Review



[.task prompt.]

This is a high risk activity. Any issues will lead to legal & financial impact. Here is a review framework you can use to detect issues

1. ACCURACY: Flag any factual claims that could be wrong or that you cannot verify.
2. COMPLIANCE: Identify any language a compliance reviewer would challenge or reject.
3. CLARITY: Highlight any sentence that could be misinterpreted by someone reading quickly.

## Show, Don't Tell



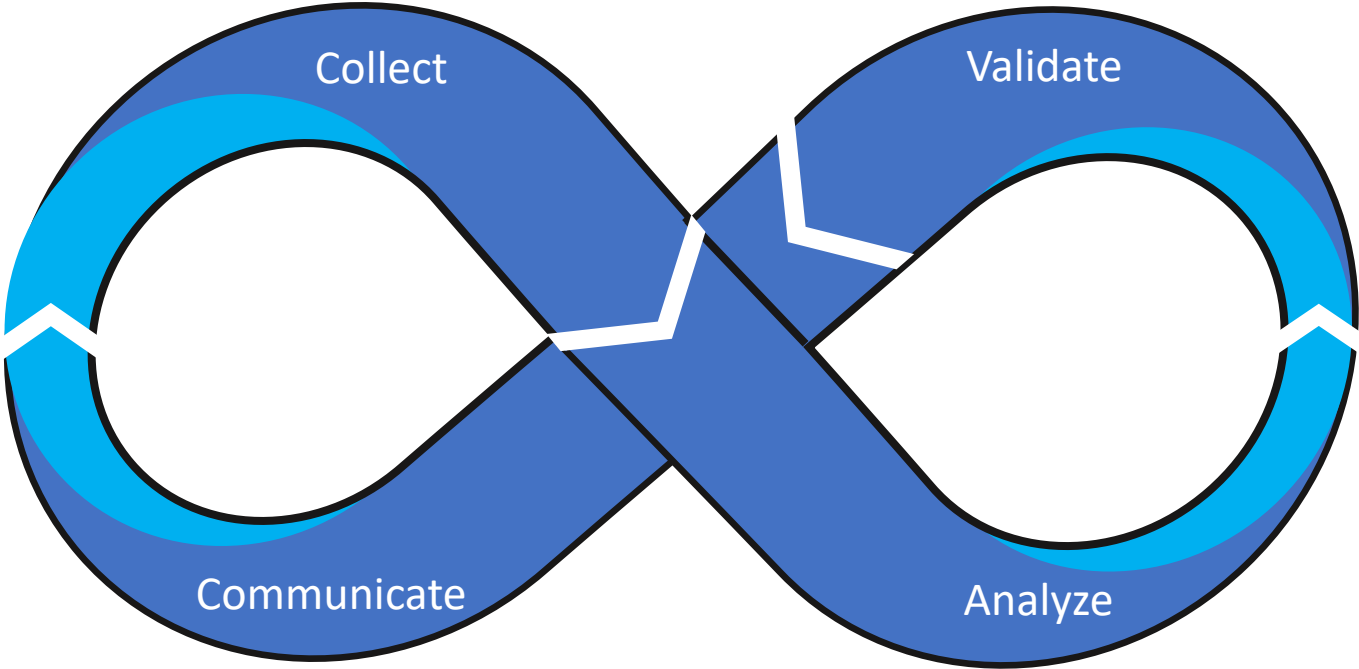
Here is an example of an RFP response that our team rated as excellent:

[paste your example here]

Now write a response to the following new RFP question using the same structure, level of detail, and tone. Maintain the same approach to citing data sources and the same balance between qualitative narrative and quantitative evidence.

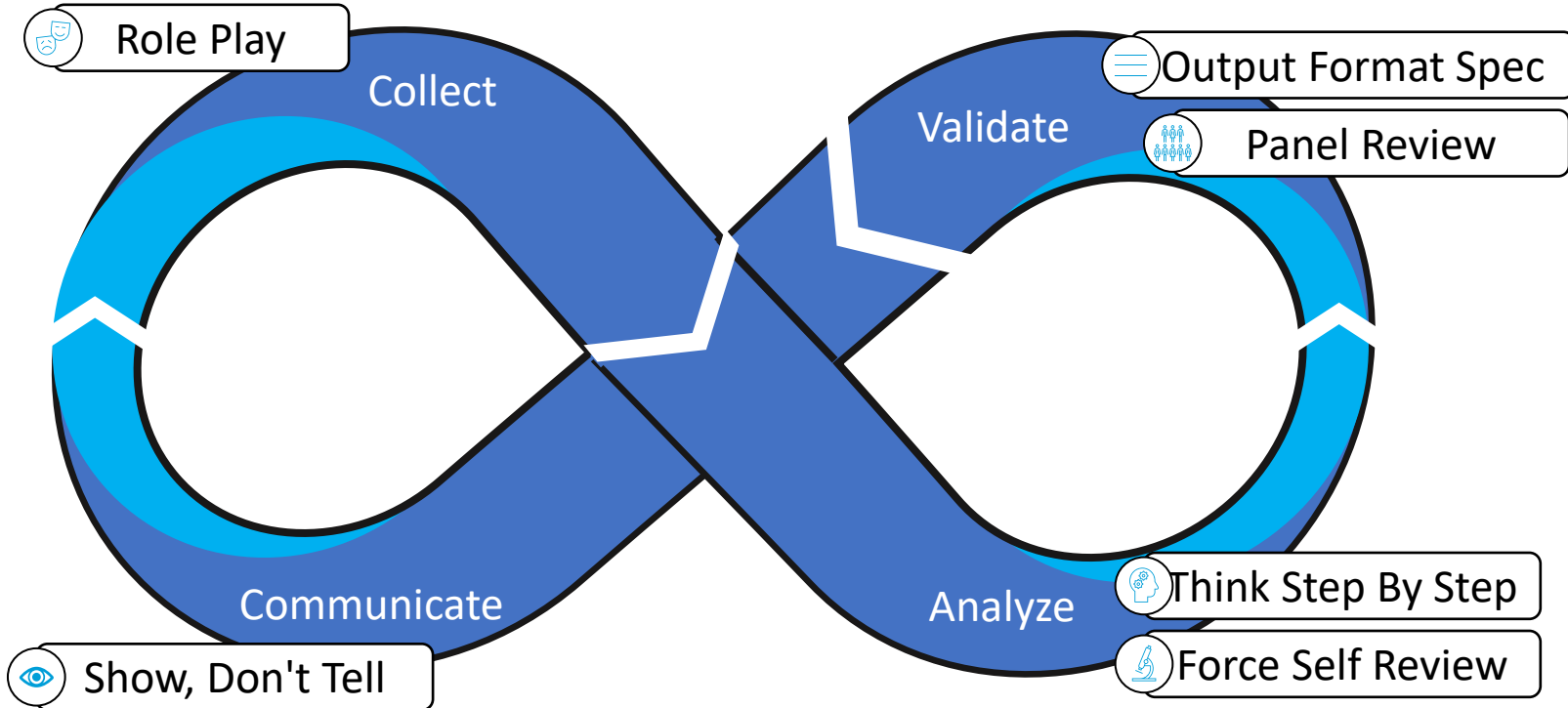
# The Infinite Workflow for Alpha

An example workflow of work in Asset Management Industry



# The Infinite Workflow for Alpha with AI

An example workflow of work in Asset Management Industry using techniques discussed before



# Thank you

Read the full article at

[sagarmandal.com](https://sagarmandal.com)

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