



SUCCESS STORY



Pisano Accelerates Investing Innovations With SR&ED Tax Credits from Partner Boast

Pisano Insights deploys AI-based analytics to assist customers in de-risking and diversifying their portfolios via exposure to currency markets.

About Pisano

A few years ago, there were plenty of tools, software, and analytics in the general investor marketplace. But Shamsher Vellani wasn't interested in going into business to offer a slightly better version of what others were already using. He started Pisano Insights to create something entirely new and innovative that would serve customers in an underserved market.

Today, Shamsher's idea and his team's focus have paid off. Pisano Insights is a fast-growth software-as-a-service company that uses artificial intelligence (AI) to provide continuously evolving analytics for capital markets. The company has over 1 billion data points analyzed to date, and nearly 2,000 days online.

"The problem we solve is unique," says Shamsher Vellani, Pisano Insights Founder and CEO. "Investors already have access to many mainstream financial platforms, but they lack an investment solution that gives them an alternative for where to invest. We create unique insights, data, and actionable opportunities to diversify into the currency markets."

Vellani launched Pisano with his partners in Vancouver, Canada, and today, they have clients and partners based all around the world. The company invests heavily in innovation, using mathematical formulas to capture market

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price action and formulate predictions using AI. Their users include high net worth individuals, multi-family offices, and fund-to-fund clients.

"To be highly valuable for our clients, our models must churn through a lot of data," said Vellani. "Our software is continuously evolving, learning, and improving. The result is a cutting-edge, artificially intelligent software that monitors, analyzes, and captures dynamic market price action in real-time."

How does this help Pisano clients? "Subscribers can get alternative investment data for another vertical—the global currency market—to balance their trading approach. They may be down in their S&P accounts, but because of the actionable data that we provide, they could be up in their currency accounts," said Vellani.

100%

FOCUSED ON INNOVATION

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SHAMSHER VELLANI, PISANO INSIGHTS FOUNDER AND CEO

Pisano Insights utilizes the Canadian Government’s Scientific Research and Experimental Design (SR&ED) tax credit program to help fund their innovation. “SR&ED helps us develop our deep learning and analytics capabilities at an accelerated pace,” said Vellani. “When you are launching a company, you are 100 percent focused on innovation. SR&ED tax credits help extend the innovation runway and give us room to breathe.”

Pisano Insights partnered with SR&ED tax credit automation provider Boast to claim all their eligible R&D tax credits and get their funds as quickly as possible. Boast worked with Pisano to provide larger claims, faster, and with less risk.

“We have loved working with Boast. They made our SR&ED process easy, and they bring more than just tax credits to the relationship,” said Vellani. “They are committed to helping clients learn more about R&D, as well as making introductions and connections. Some of our biggest investors were introduced through the Boast community. Boast has opened a lot of doors for our company.”



Pisano Insights and Boast Partnered to Make SR&ED Better for the Pisano Team

Easier: Saved over 50 hours of collective Pisano team time through their annual SR&ED process

Larger Claims: Pisano estimates Boast helped them get a 20 percent larger claim due to Boast automation and insights

Less Risk: Boast AuditShield provides audit documentation and expertise if an audit happens

BOAST

Learn more about Boast’s tax credit and R&D intelligence software solutions.

boast.ai

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Learn more about Pisano Insights’ cloud-based, scientific solutions for capital markets.

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