SIMIP

Delivering Competitive Advantage through xAI-Powered
IP and Business Intelligence.

My IP/AI Journey…..

SMEs &
IP

Identifying
High Potential
Firms

1998 Pilot:
IPR-Helpdesk

Barriers for SMEs

Data the
Key Enabler

SimIP +
Moody's Partnership
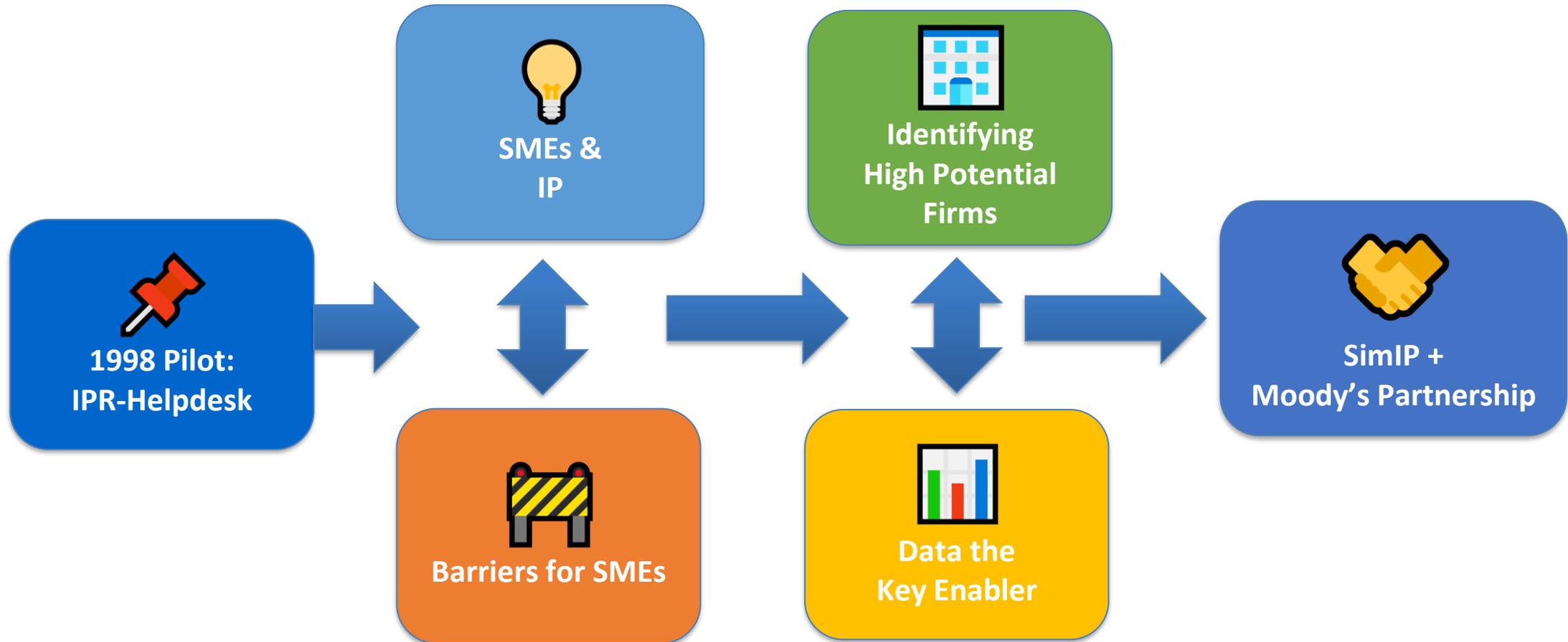
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Opportunity…..

The analysis of IP and business data undertaken by SimIP, takes us "through the looking glass" to uncover clarity, opportunity and strategic insight across the IP space.

Orbis and Orbis IP datasets, actionable market intelligence, undertaking comprehensive company and intellectual property (IP) analysis, to;

➢ Identify potential high-growth entities through historical financial and operational metrics.

➢ Deliver company and sector benchmarking opportunities.

➢ Provide eXplainable AI patent valuation solution.

➢ Uncover white space opportunities, integrating patent landscape mapping from Orbis IP with company and market presence data from Orbis.

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SimIP and xAI….

SimIP have built upon two pillars:

➢ **Data Foundations:** Moody's Orbis comprehensive, curated, and interconnected datasets covering global corporate and intellectual property information.

➢ **Explainable AI (xAI):** A class of AI technologies designed for transparency, transforming AI from a "black box" oracle into a trustworthy, accountable strategic partner.

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Moody's Orbis & Orbis IP – Powerful combination of datasets

Powerful and comparable

- ☑ comparable information
- ☑ corporate ownership structures
- ☑ holistic view of entities

2.9m
M&A deals and rumors

177m
patents from 157 countries

187m
trademarks from 198 countries

520k
Global Greenfield Projects

Orbis
Mergers & Acquisitions

Orbis
Intellectual Property

Orbis
Crossborder Investment

Note: Figures collected Jul 30, 2025. Figures are rounded.

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Orbis Global Entity Dataset - 590m Companies

+12% 1 year

590m companies and entities

93m companies with MSCI Indicative ESG scores

587m companies with Moody's Probability of Default scores

183m sole proprietorships

6.5m companies with Cyber Risk Ratings by Bitsight

51m private companies with detailed financials
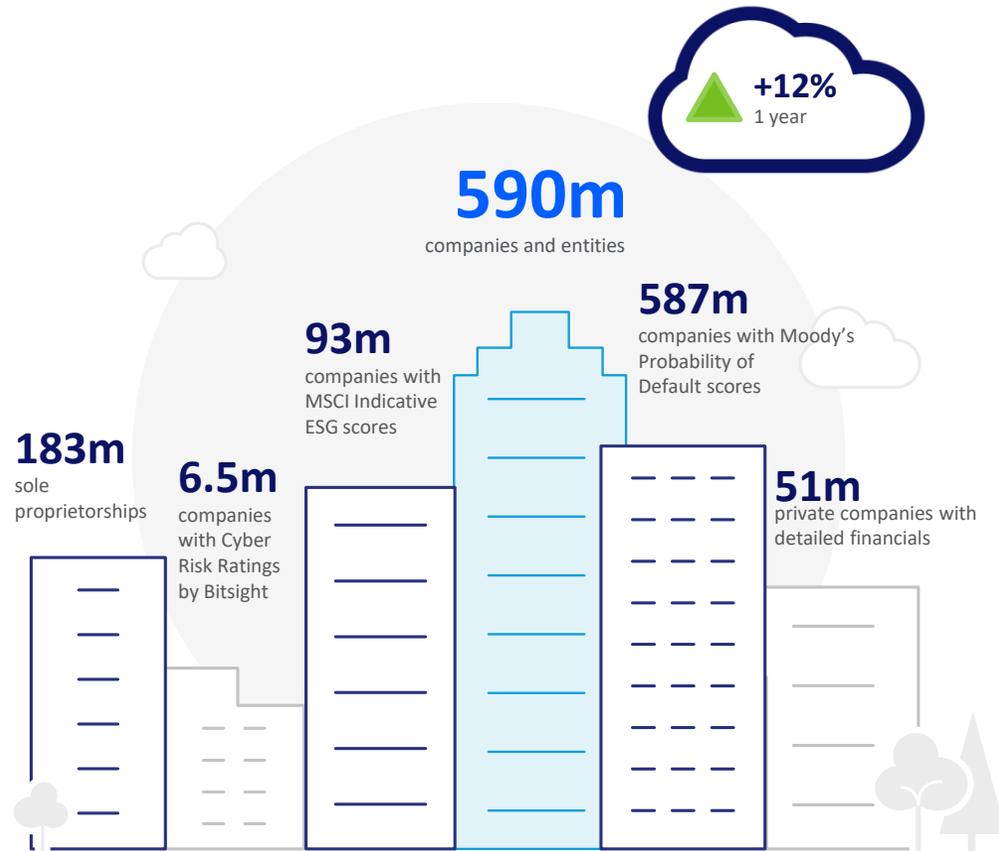
919,000 banks

876,000 insurance companies

7.7m non-bank financial institution

132,000 marine vessels

83,900 listed companies

Note: Figures as of July 2025. Figures are rounded.

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Orbis IP Specific Dataset

170M
Patents

Powerful functionality and data visualization tools allow you to search for specific patents across regions or sectors.

2.4M
Companies

We link patent applicants to our vast universe of companies to see extensive patent portfolios for a company and its corporate group.

163
Countries

Our database includes global patent-associated data, and we match in-map companies with their patents.

275K
Litigations

We identify which patents are enforceable, who has received damages or royalties, and potential legal threats to other companies in other jurisdictions.

330K
Standard essential patents

Identify high-quality patents in a company's portfolio or see which companies own foundation technology patents.

24M
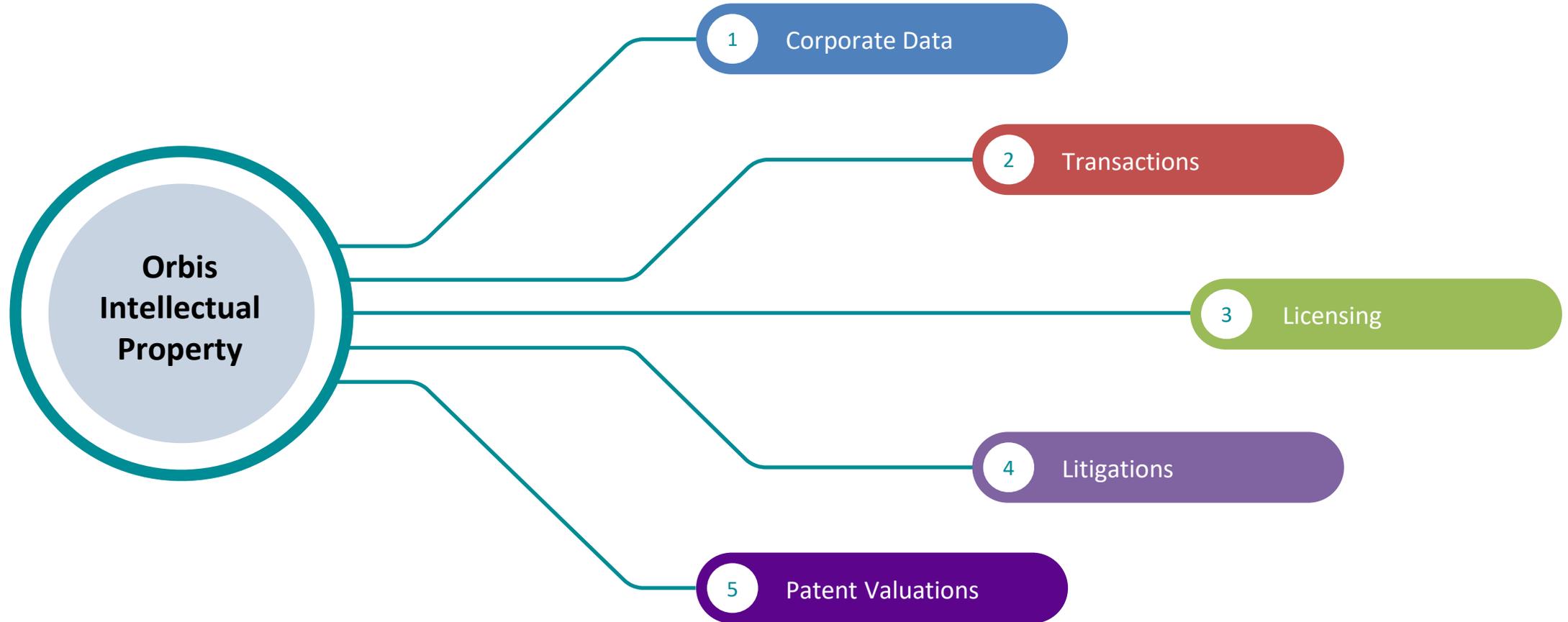### Patent transactions

Study patent transactions and their histories to recognize what companies are developing and protecting, understand patent flow for M&A, and learn from who holds spillover patents.

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Data Differentiators

Orbis Intellectual Property

1. Corporate Data
2. Transactions
3. Licensing
4. Litigations
5. Patent Valuations

1. Identifying High-Growth Entities...

- **IP is the forward-looking Indicator:**
- Unlike financial statements (which are lagging), IP filings provide a real time glimpse into a company's future plans and their innovation pipeline.
- Studies show that SMEs that file for IP rights are significantly more likely to be high growth.

- **SimIP machine-learning model trained on Orbis + OrbisIP features**
- Predicts which firms in your cohort / in general have the highest probability of rapid growth over the next 2–5 years and factors behind said expected growth.
- Engine scores and ranks companies by their growth potential.

- **A VC uses the engine to shortlist SMEs with 70%+ chance of >20% CAGR.**

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2. Benchmarking...

➢ Delivers a **"league table"** view of a company's innovation and performance within peer cohorts.

➢ Easy-to-use dashboard to compare against similar firms and industry averages.

➢ Compares R&D efficiency and patent impact against top competitors, to guide investment.

➢ **xAI redefines the landscape:**

➢ SimIP platform shifts the analysis from industry codes to the actual technological substance of a company's innovation portfolio.

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3. IP Valuation...

➢ **Limitations of Traditional Valuations:**

➢ Methods (Income, Market, Cost) are static, labor-intensive and struggle with novel technologies that lack a clear revenue history or comparable market transactions.

➢ SimIP introduces transparency in the patent market and serves as a foundational step towards enhancing patent utilization rates.

➢ Feeding the algorithm with market transactional data.

➢ Our xAI system enables a dynamic valuation by analyzing thousands of data points simultaneously to produce a more holistic and continuously updated figure.

➢ **Data Inputs for the Model:**

➢ Patent-specific data (citations, claim breadth).

➢ Technology context (is the field "hot"?).

➢ Owner's corporate profile (financial strength, litigation)

➢ Real-world transactional data.

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4. White Space Analysis...

> **The Strategic Imperative:**

> White space analysis is the process of mapping a technology landscape to find under explored areas that are ripe for new, defensible innovations.

> **Manual Bottleneck:**

> The traditional process of segmenting a technology domain and manually plotting thousands of patents to find gaps is incredibly slow and very labor intensive.

> **AI-Powered:**

>> **Automated Landscaping:**

>> AI techniques like NLP and clustering can automatically analyze thousands of patents and group them into logical technology clusters, creating a visual "heat map" of innovation.

>> **Visualizing Opportunity:**

>> Crowded areas appear "hot," while "cool" or empty areas represent potential white spaces.

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Virtual Cycle....

The SimIP xAI platform generates unique insights by combining Orbis and Orbis IP data.

1. These **insights inform better strategic decisions**.

2. These **decisions generate new internal data** on what works.

3. This **new data is fed back into the system**, making the models progressively smarter and more attuned to the business.

4. SimIP xAI tools create a **self-reinforcing competitive moat** where the business intelligence grows stronger with every decision it takes.

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AI driven strategic decision making….

The SimIP added value is achieved when these datasets are not used for isolated, static analysis but are integrated into a strategic intelligence framework.

By combining insights from;

- **HGE identification,**
- **performance benchmarking,**
- **IP valuation, and**
- **white space analysis,**

……companies, investors, policy makers and others, gain a holistic, dynamic and forward-looking understanding of the competitive business environment and innovation opportunities.

This integrated approach, developed by SimIP, supported by continuous monitoring and a commitment to data quality, transformed Orbis and Orbis IP from data information repositories into powerful engines for advancing AI driven strategic decision making, delivering competitive innovative advantage across the IP space.

SIMIP

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