Patents

The competitive landscape of Investment Management (IM) and Business Management (BM) is currently changing to become more open and international, primarily due to new and improved investment and business applications and solutions, enabled by new technologies within ICT and AI. Therefore, the need for innovative R&D is increasing, both in the finance and management consultancy sectors.

In parallel to all the driving forces for change and new business models, protection of Intellectual Properties (IP) is becoming increasingly important. Today, all leading firms and institutions within IM and BM create and use IP on an ongoing basis, especially when you are dependent upon analytical algorithms and involved in the automation of decision-making.

The IP-Strategy: Patents and IP help facilitate the international sharing of technological knowledge on a commercial and legal basis. Patent owners are awarded a limited period of reserved rights to ensure adequate remuneration for its inventions and techniques, in exchange for sharing and enabling the enhancement of technological development.

CBOLABS IP-strategy is, primarily, to protect its research outputs and immaterial assets through patent applications and licensing methods and technology. The focus is on USPTO patents, while other countries are selected on a case-by-case basis. The US is the world leading market for IM and BM, as well as ICT and AI technology, and CBOLABS must relate all its outputs to both American competition, potential licensees and other clients.

UNITED STATES (USPTO) PATENTS

- **Methods and Systems for Comparing Stocks:**
  U.S. Patent No. 8,751,354, received by Leif G Bohman in 2014, with Banner & Witcoff, Washington DC, as agent and assigned to CBOLABS.
  ABSTRACT: An instrument and system for consistent and objective comparison of stock exchange listed stocks, regardless of geographical market, business activity and trading currency is provided.
  - The instrument is configured to compare stocks current trading prices, by producing iso-prices and iso-values.
  - Two stocks iso-prices have equal premiums and discounts, in relation to their respective long-term price trends.
  - Iso-values, on the other hand, represents prices that corresponds to the same compounding rate of stockholder return.

- **Web Platform with Customized Agents for Automated Web Services**
  U.S. Patent No. 10,325,319, received by Leif G Bohman in 2019, with Banner & Witcoff, Washington DC, as agent and assigned to CBOLABS.
  ABSTRACT: A web platform for automated investment management services is provided. The platform may enable the automated management of client funds, invested in stocks and other traded assets such as commodities and gold, as well as other traded securities and financial instruments like stock options, stock funds, stock indexes, bonds and structured products.
  - The platform may support customization based on each clients' investment profile and policy.
  - Agents may be dynamic and thus may enable the implementation of portfolio strategies that automatically adapt to changes in global and stock currency factors.
  - In some embodiments, the platform may utilize genetic learning algorithms.
  - The platform may support market making and distribution of third party funds and instruments, as well as an investor community, where clients can provide agents to allow others to co-invest.

Priority Areas for New Patent Filings

Based on the ongoing research projects, new patent filings can be expected within the following areas of technology:

- Investment Management (IM)
    - Contextual Statistics Methods and Vector Databases
    - Downside Risk Measuring Methods
    - Customized and Coherent Portfolio-Algorithms
- Business Management (BM)
    - Coherent NDF-Machine for Misfit Identifications
    - BM-Robots for Customized Strategic Management Advice

For questions, further information and communication on the above endeavor’s, please contact Leif G Bohman, leif.bohman@cbolabs.com.