



How private equity firms used Code Mode to build agents on decades of data.

Network intelligence and portfolio monitoring draw on decades of firm data and relationships. The firms own that intelligence; Code Mode let their agents work through the full history and return a credible introduction route or a complete portfolio update.

Two reliable answers from decades of internal data.

The firm needed to answer two recurring investment questions. Who in its network could make a credible introduction to a company under evaluation? What changed across the portfolio this quarter? The answers were buried in relationship history, investment records, and financial data that had accumulated over decades.

THE USE CASES

Port of Context built one agent workflow for each question. Without Code Mode, the AI made one search, read the raw results, decided what to search next, and repeated. It carried every batch of data into the next step. With Code Mode, the AI created one program to run the entire research sequence. The program searched, checked, and organized the data, then returned the finished result. For network intelligence, that result was the strongest relationship path. For portfolio monitoring, it was a complete view of every company and quarter.

NETWORK INTELLIGENCE

Find a credible warm introduction.

When the firm evaluates a target company, it needs to know who in its network can make the introduction. The agent resolves six targets, handles ambiguous matches, and identifies the strongest route.

PORTFOLIO MONITORING

Build a comparable portfolio update.

The firm needs one view of performance across its investments. The agent brings together financial data for dozens of portfolio companies and returns the required eight-quarter summary.

The agent found the strongest warm-intro path for each target company.

In the measured network-intelligence run, the agent had to find the strongest warm-intro path for six target companies. It searched across decades of the firm's investment relationships, tracing people, companies, and the connections between them. It also had to resolve ambiguous matches, try fallbacks, and identify the most credible route to the right person.

Without Code Mode, the model had to run the research one search at a time. It reviewed each candidate list, decided what to search next, and carried the earlier results forward. With Code Mode, the model created a program to do that repetitive work for it. The program checked all six companies, tried another search when a match was unclear, traced the possible introduction paths, and ranked the results. **The model then used that complete, ordered list to recommend the strongest route.**

WHAT THE FULL SEARCH REQUIRED

The chart summarizes the model work required to produce the same final recommendation through each execution path.

EXECUTION PATH	MODEL TURNS	INPUT TOKENS	MODEL RECEIVES	ANSWER
Traditional path	12	~131K	Searches and candidates	Recommended route
Code Mode	1	11.4K	Ranked matches only	Recommended route

MEASURED CODE MODE RUN	TRADITIONAL WORKFLOW
11.4K input tokens to resolve six companies and return the strongest relationship paths.	~131K input tokens to complete the same work through the traditional path.

The agent built a complete eight-quarter view across the portfolio.

Every quarter, the firm needs one comparable view of every portfolio company. For each company, the financial data sits across multiple pages, and the update needs eight quarters in the same format.

Without Code Mode, an agent can stop before it has pulled every company into the update. Code Mode let it bring together the complete financial picture for every company in the portfolio and turn it into one eight-quarter view.

WHAT IT TOOK TO ASSEMBLE ONE UPDATE

One complete update means gathering enough information to compare dozens of companies across eight quarters. These figures show how much work each approach required.

Traditional workflow	Code Mode result
84 model turns	1 model turn
~3.092M input tokens	1.85K input tokens

COLLECT

Bring in every company's data.

The agent works through the available records so no company is left out of the update.

ORGANIZE

Put the figures in the same format.

The financial data is organized into the same fields for every company and quarter.

DELIVER

Return one complete update.

The team receives an eight-quarter view that is ready to compare across the portfolio.

ACROSS BOTH WORKFLOWS

Code Mode let both agents finish the full job with far less model context.

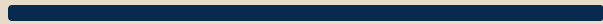
The network-intelligence agent compared possible paths across decades of relationships. The portfolio-monitoring agent gathered every company and quarter required for the update. Each returned the complete result in one model turn.

INPUT TOKENS REQUIRED TO COMPLETE EACH WORKFLOW

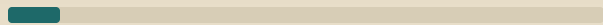
Traditional Code Mode

Network intelligence

Traditional workflow ~131K



Code Mode 11.4K

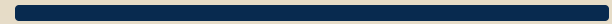


91%

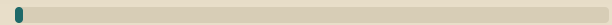
fewer input tokens while returning the strongest introduction path.

Portfolio monitoring

Traditional workflow ~3.092M



Code Mode 1.85K



99.9%

fewer input tokens while returning the complete eight-quarter view.

Code Mode kept intermediate searches, candidate matches, and financial records out of model context. The model received the ranked introduction path or the finished portfolio view. **That made both workflows practical to run in production against the firm's full internal data.**

