

Squirro for Financial Services

Empower your origination team with the relevant information at the right time. Source new deals by identifying signs of transactions in unstructured data from online and premium data sources.

SQUIRRO FINANCIAL SERVICES APPLICATIONS

Financial Services is a complex, research- and data-intensive industry. Modern AI technology offers context-aware insights to drive value and grow business opportunities. Squirro developed a product suite of applications to uncover new opportunities and generate actionable recommendations to make smarter business decisions.

1. Deal Origination

Squirro's Financial Services Applications support the Deal Origination process by automatically detecting relevant trigger events in both internal and external data. By unifying all the relevant data, it allows your teams to obtain a complete view of clients, markets and competitors and to identify opportunities otherwise gone unnoticed.

Using AI and Machine Learning, Squirro features out-of-the box catalysts to detect events relevant to CIB, IB, ECM/DCM, M&A, REF, IAM and PB.

The recommendations are presented in an intuitive dashboard or delivered as a daily email snapshot. Squirro also fully integrates in your Salesforce CRM and others systems.

2. 360° Client Cockpit

Additionally, Squirro provides a comprehensive 360° Client Cockpit, meeting preparation reports, and relationship maps. By unifying siloed data from call notes, old pitchbooks and presentations, earning call transcripts, premium data sources, and many others, Squirro offers a full view of clients and the markets you operate.

3. Next Best Action Recommendation

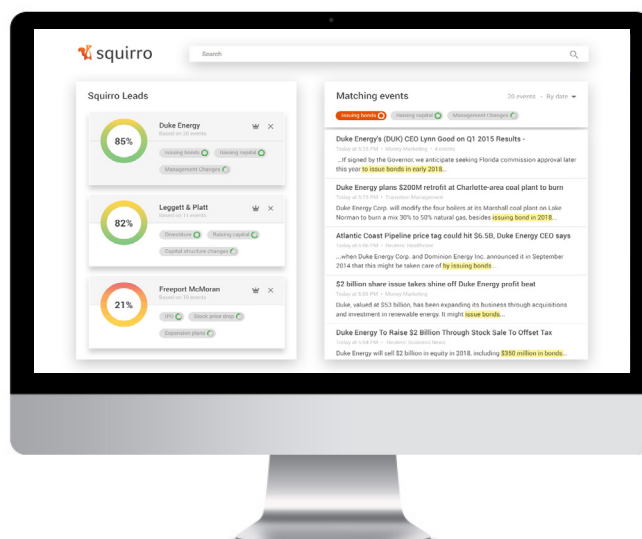
Squirro creates a unique profile for the current deal and matches it with potential profiles, based on past activities, forward looking statements, and the detection of other relevant signals. Squirro's pre-trained AI models drive recommendations for investor counter-parties, funds and relevant products for up & cross selling opportunities.

FINANCIAL SERVICES APPLICATIONS

Squirro builds fast-tracking, packaged applications with out of the box market relevant catalysts, pre-trained AI models and pre-configured data connectors.

Squirro FS Applications include:

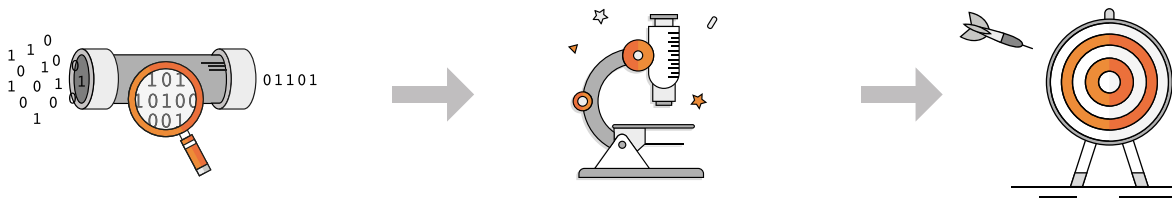
- Investment Banking
- Corporate Institutional Banking
- Institutional Asset Management
- Real Estate Finance
- Commercial Insurance
- Commercial Underwriting and Reinsurance



HOW IT WORKS

EXAMPLE: EQUITY & DEBT CAPITAL MARKETS

Most data used by investment banks is structured. But the really insightful data is unstructured. Squirro for Corporate Financial Services helps to deliver a deeper understanding of clients, market conditions, and crucially, potential opportunities.



DATA SOURCES (INTERNAL)

- Meeting notes from CRM
- News Articles
- Earnings Call transcripts and Presentations
- Email interactions
- Pitchbooks
- Investment history database

CATALYST DETECTION

- Plans to raise capital (equity or debt)
- Capital Structure changes
- Expansion plans
- Company exploring an IPO
- Management changes
- Past activity
- Forward looking statements
- Catalyst detection information

AI-DRIVEN RECOMMENDATIONS

- Potential client leads
- Possible transactions
- Potential counter-party match for a transaction (funder, M&A etc...)
- Potential capital raising mandates to pitch for
- Investors most suitable for the current deal

PREMIUM SOURCES (EXTERNAL):

Next to public web data, the following licensed premium sources can be made available in Squirro: Capital IQ, Dealogic, Dow Jones, Factiva, Factset, FT, LexisNexis, MergerMarket (Acuris), Refinitiv, Street Account and more...



CHALLENGES

- Identify new opportunities or change in investment strategy
- To be able to source new business opportunities or to handpick best products for their clients, institutional asset managers have to go through a vast amount of different data to find clues about how to win business
- Information is spread out and difficult to access



SOLUTIONS

- New sales opportunities alerts
- Enable portfolio managers to make smart decisions, like suggesting matches of the right funds to each client or lead
- Recommendation framework that combines structured and unstructured data to provide contextual information summary, along with investment recommendations



BENEFITS

- Increase business opportunities and drive more revenue
- Stay ahead of competition with personalized service to every client
- Save hundreds of hours of manual research

READY TO SCALE AND EVOLVE WITH YOU

Add more data sources, create tailored catalysts or expose information in new and unique ways - just right for you.

ABOUT SQUIRRO

Squirro provides Augmented Intelligence solutions. Its unique technology marries Artificial Intelligence, Machine Learning and predictive analytics, empowering organizations to transform enterprise data into AI-driven insights. Organizations using Squirro take advantage of its ability to source leads and recommend the next best action in an automated way. Its real time 360 degree client cockpit provides a holistic and comprehensive understanding of the customer journey. Squirro's applications for Corporate Financial Services, Insurance and Manufacturing are successfully used by leading global organizations, such as ING, Investec, Helvetia, AXIS Re, Sony and Bühler. Founded in 2012, Squirro currently has offices in Zurich, London, Munich, New York, San Francisco and Singapore.