Squirro

Squirro for Corporate Financial Services

Institutional Asset Management

Financial institutions are seeking novel ways to use voluminous data from across the globe to make important investment decisions. While existing business intelligence is mostly built on structured historical and present data available within firms, enterprises also want to use the growing unstructured data.

Predictive analytics, artificial intelligence, and machine learning can be used to detect patterns hidden in structured and unstructured data to produce actionable insights, which can increase the accuracy of key investment decisions.

Artificial intelligence (AI) and machine learning are set to power this transformation, and **Squirro for Corporate Financial Services** is leading the way. Squirro's AI-powered solution helps asset managers find new client opportunities and offer the best products to their clients, delivering a better client service and saving countless man-hours on research.

MORE BUSINESS AND MORE TARGETED PRODUCT OFFERING

There is no question that institutional asset managers have access to more data than ever, from premium data subscriptions such as Thomson Reuters or Bloomberg, to their internal structured and unstructured data such as CRM data, call transcripts and customer emails. Yet managing money for bigger institutional investors is a challenging and highly competitive sector. Until now, institutional asset managers have struggled to extract insight from data with which to find new deals for themselves and opportunities for their clients.
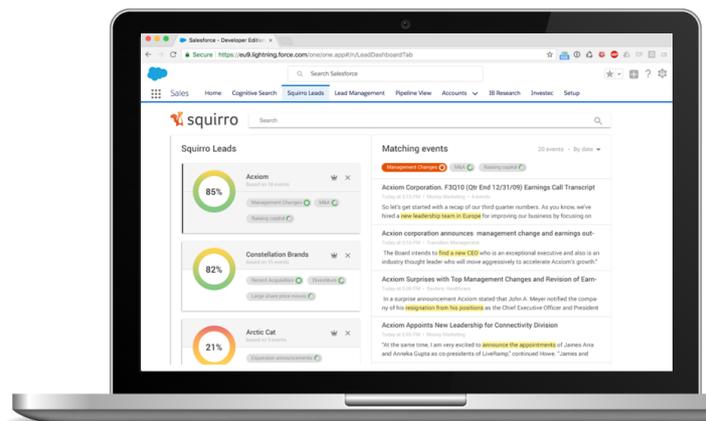
Because **Squirro for Corporate Financial Services** is based on Squirro's market-leading Augmented Intelligence platform, asset managers can now make better use of data than at any other time previously. They can now gain a deep understanding of the overall market and the specific opportunities for their clients, including:

- **Increase the accuracy of key investment decisions**
  The power of **Squirro for Corporate Financial Services**' AI, Machine Learning and Predictive Analytics capabilities allows it to detect patterns hidden in structured and unstructured data to produce real-time actionable insights and offer recommendations on which opportunity would be best, or which funds would be the best match for a given client or lead. **Squirro for Corporate Financial Services** scores and ranks every opportunity and provides actionable recommendations to institutional asset managers to facilitate portfolio management decisions.

- **Source new business opportunities faster and more accurately**
  Squirro for Corporate Financial Services unifies all data to allow institutional asset managers a complete view of their clients and the industry they operate in. This insight enables portfolio managers to identify all the relevant events and catalysts that trigger an opportunity that otherwise would have been missed, gone unnoticed, or worse, found by a competitor.

- **Make major resource savings in manual research** –
  wading through CRM systems, premium external data sources, call notes and much more is hugely time consuming for asset managers. It is also highly inefficient, as details can be overlooked that Augmented Intelligence. Using **Squirro for Corporate Financial Services**, asset managers will make major savings on research time, hundreds of man-hours that can be used elsewhere.

HOW IT WORKS

Most of the data used by institutional asset managers is structured. It is often siloed too. **Squirro for Corporate Financial Services** not only captures siloed data from across the business, it also adds structure to unstructured data, allowing users to benefit from the rich insight contained within. It truly excels, extracting fresh and insightful meaning from it. This helps to deliver a deeper understanding of clients, market conditions and crucially, potential opportunities.
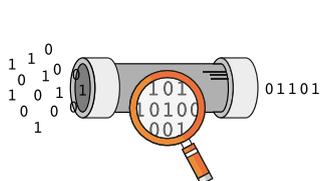
SOURCES

- Meeting notes from CRM
- News Articles
- 10K/Q Filings
- Earnings Call transcripts and Presentations
- Premium Data Sources (TR, Bloomberg, Fund Fire etc..)

CATALYST DETECTION

- Underperformance
- Underweight international
- Underweight emerging markets
- RFPs
- Hirings
- Changes in allocations
- Favorable views on "emerging markets", "international" etc.
- Management Changes

AI-DRIVEN RECOMMENDATIONS

- Potential prospect leads
- Ideas to pitch to clients
- Fund recommendations

CHALLENGES

- Identify the early signs of a potential deal or a need for new capital, fast enough to approach the client before competition does
- 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

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.

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