Real time Investment & Trade Advisory
Powered by Watson

Financial Firms increasingly focusing on advisor productivity & compliance.
- Tier 1 Banks are looking to transform their sales persons to play advisory role through better customer insights.
- Tier 1 Wealth Management firms are focusing on improving their advisor productivity
- Boutique firms increasingly looking to provide greater control to their clients in investment decision making
- Current solutions are not interactive to provide the information in the areas of Market information, investment opportunities, compliance, regulations, etc.
- A need is felt for more intuitive and intelligent solutions to deal with complexity of financial products & compliance & customer preferences

RITA – Solution Overview

RITA powered by IBM Watson is envisaged to address this gap by intuitively providing information to advisors, sales teams and customers enhancing overall productivity

1 RITA enables the Financial Services Firms to provide contextual & real time information through cognitive & tactical based personal advisory based on dynamic persona as well as market dynamics

2 Focused on multiple asset classes like equities, mutual funds, ETFs, etc.

3 Empowers the Human Advisors with contextual information about customer behaviour which helps in handling investor questions

4 Rebalancing of portfolio across asset classes through various performance comparisons
- Proportion - sacred, moderate & aggressive assets
- Industry concentration reports
- Internal Analyst Reports
- External Analyst Reports
- Sector & stock performance

Trusted Advisory through Cognitive Analytics

Financial Advisory services are looking at engaging their clients more effectively, through effective and informed interactions, provide contextual goal based investment advisory, increase the trust of the clients and enhance the wallet share while ensuring that the ever changing Regulatory & Compliance challenges are met.

RITA Powered by Watson for enhanced advisory productivity

- ◘ Profile the customer for micro segmentation thus improving hit ratios of products/services by min 20%
- ◘ Risk Profile of the customer
- ◘ Configurable for multiple profiles for a single customer
- ◘ Various modes of data capturing like voice, text, etc.
- ◘ Intuitive persona based dashboards
- ◘ Inputs to advisors on the market trends and impacts on customer portfolios
- ◘ Maintain Product & Service information to be provided to advisors on query
- ◘ Revenue generation ability improves due to faster conversion

Business Benefits

1	Improved understanding of customer requirements/ behaviour
2	Up to 20% revenue increase due to deeper insight on customer portfolio performance & market impact
3	Gain predictive insights to identify & leverage cross sell opportunities
4	Innovate products/services based on client behavioral pattern correlating transaction, interaction and demographic data along with dynamic persona

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