

BFSI Use Case

Wealth Management

Our Wealth Management App is designed to assist client-facing wealth advisors during their sales process by providing insights into their performance, clients, and products on the go.

Key Performance Indicators

- Assets under Management (AUM): Total size of investments made by the clients under the management of the Investment firm
- Number of Clients
- Fund growth and performance
- Investment Fund Compliance

Users

- Wealth Advisors
- Relationship Managers
- Regional Managers

Benefits

- The app provides information on the size of investments for clients along with fund growth and performance
- It provides the Wealth Advisors a set of recommended products for clients based on their investment history preferences. This helps improve cross-sale revenues.
- It enables tracking of investment fund compliance requirements for all their advisors, using various parameters like client contact, documentation and information completeness
- It finds best-fit clients for new products filtering the client list based on– client type, client portfolio size, and last contact with the client
- It provides the ability to search for any client within the portfolio and get the most recent information about the relationship, client needs, goals, and portfolio performance

About InfoCepts

Since 2004, InfoCepts has enabled leading companies like UBS, Nielsen, GE and Bayer to derive value from their data. Recently featured in Gartner's Market Guide for Data Science and Machine Learning Service Providers, our 750-strong pool of consultants has expertise in 60+ Business Analytics and Information Management technologies. Our BA-IM specific development methodologies and the differentiated expertise of our multi-award winning DV team help us deliver solutions that derive maximum value from enterprise data. Every day over 70,000 users across industries use analytics solutions developed by us to make better decisions.

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