

# Engage: AI-Powered Trading Insights

## CUSTOMER

A global financial services company

## PROBLEM

The banking and financial services company sought a way to better differentiate and personalize their services to traders. Their clients' actions appeared random without an understanding of the underlying patterns of their past activity. Due to a lack of deeper insights, the bank risked eroding client loyalty.

## SOLUTION

The client chose AI-driven trading insights from CognitiveScale, which provides personalized market intelligence regarding the historic relationship between financial instruments based on the user's current and previous portfolio positions. Individual investors and traders receive hyper-personalized insights and intelligence, driven by a customer Profile-Of-

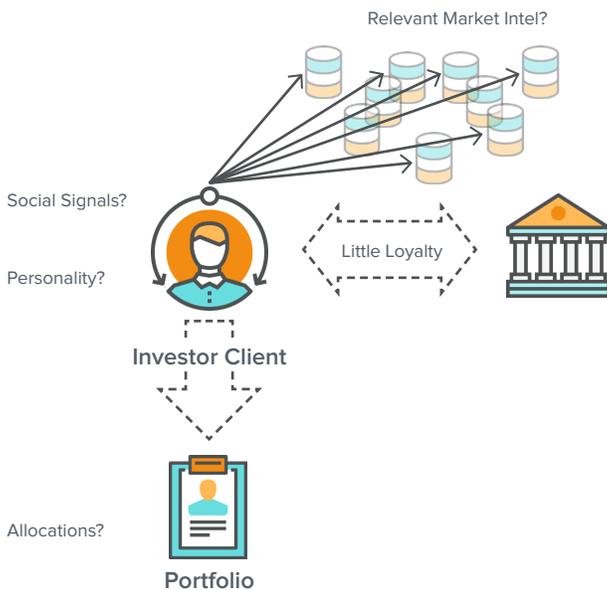


Figure 1: Clients struggle to access and filter investment options that best match their behavioral profile and trading strategies

One™. The software focuses on the “what and when” of trades, anticipating a trader’s needs, analyzing triggers from prior market actions, and providing them with higher-value insights.

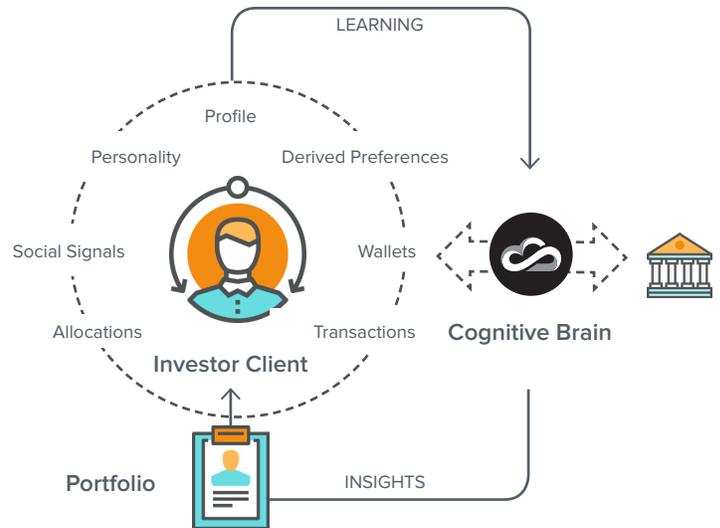


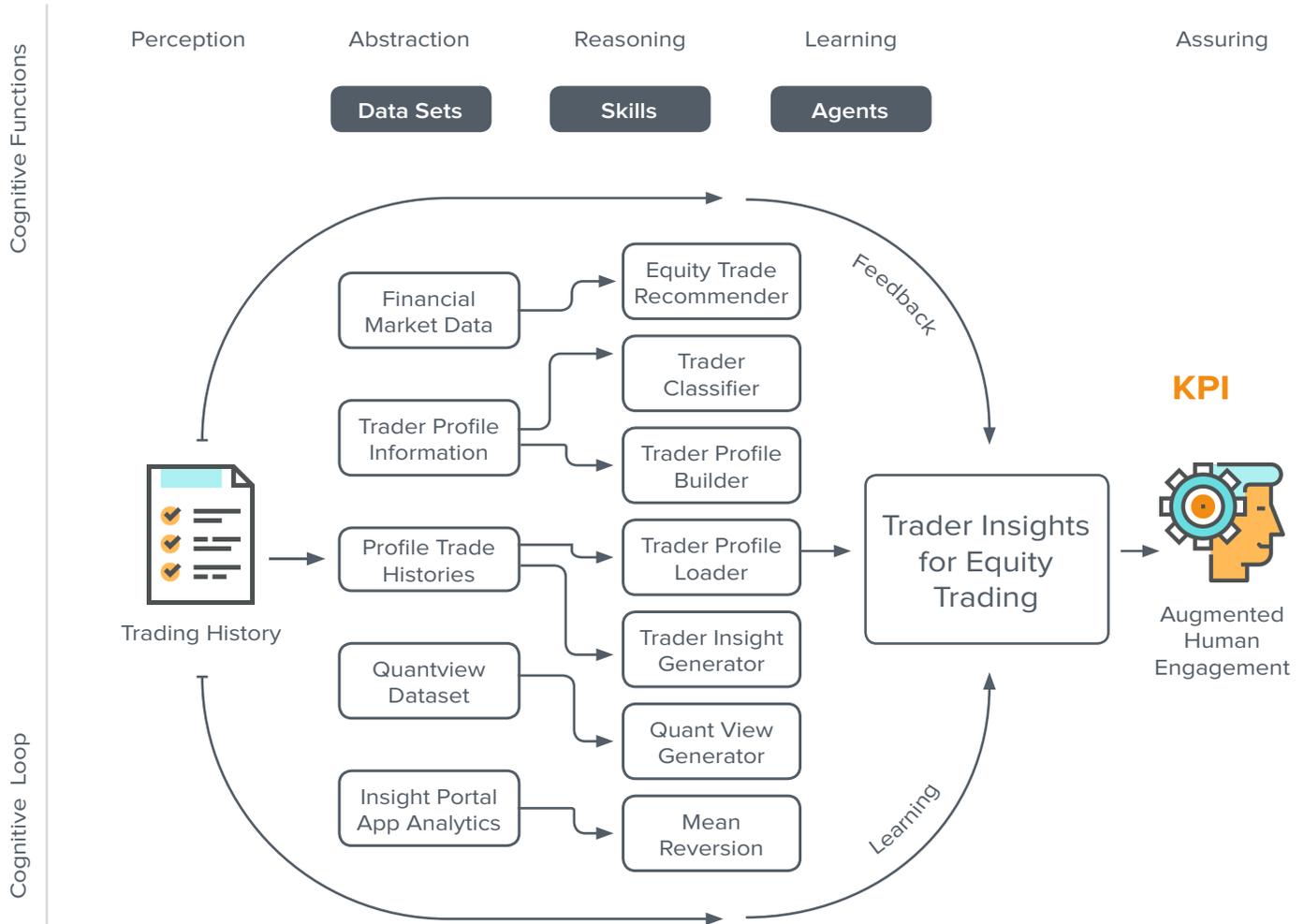
Figure 2: Relevant market/trading insights for clients using highly personalized and powerful behavioral profiles based on their historical trading styles.

## IMPACT

The bank and its customers benefit from offering highly personalized, trader-specific insights which include the rationale behind AI-powered recommendations. Traders receiving personalized service reward their financial institutions with increased custodial and trading fees, share of wallet, and loyalty.

- Improved loyalty via a unique and highly personalized service
- Increased custodial and trading fees
- Consolidation increasing “wallet share”
- Increased revenue via new client acquisition

# Trading Insights Agent Anatomy



## SEE

a number of different events being published for energy stocks across the world

## KNOW

based on your trading history that you tend to trade on earnings statements

## ASSIST

by filtering out millions of events and send you key earnings insights that are related to potential trades you would consider based on your specific portfolio

## LEARN

from new data entering the system as well as ongoing feedback on the insights and recommendations provided

## OPTIMIZE

by constantly monitoring and ranking all of the insights and prioritize only the ones you care about based on these learnings

## BUILD TRUST

by providing concrete evidence supporting these recommendations and insights so you understand the rationale

## About CognitiveScale

CognitiveScale sells augmented intelligence software that solves complex business problems at scale for financial services, healthcare, and digital commerce markets. Built on its Cortex augmented intelligence platform, the company's software help enterprises apply AI and blockchain technology to increase user engagement, improve decision-making, and deploy self-learning and self-assuring business processes.

Headquartered in Austin, Texas, CognitiveScale has offices in New York, London, and Hyderabad, India, and is funded by Norwest Venture Partners, Intel Capital, IBM Watson, and Microsoft Ventures.

For more information on the company, please visit us at [cognitivescale.com](http://cognitivescale.com) and follow @cognitivescale on Twitter, Facebook and LinkedIn.

Contact an AI specialist at [cognitivescale.com/contact](http://cognitivescale.com/contact)