

Engage: AI-Powered Research Assistance

CUSTOMER

A global 500 bank with a large equities research team

PROBLEM

The bank's research analysts invest significant time and manual effort investigating and performing due diligence on real-time global events. Subject to tight time frames, they often overlook key internal information, scattered across multiple tools, and many significant external events remain uncorrelated or are missed altogether.

This results in:

- Margin compression due to costly processes in a highly competitive space
- Missed opportunities leading to lower revenue

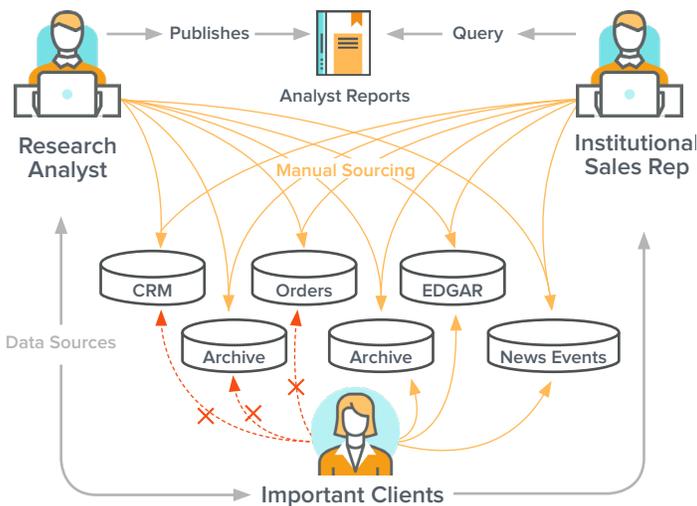


Figure 1: Finding relevant data and generating meaningful research insights is time-consuming and costly

SOLUTION

The bank chose AI-Powered Research Assistance from CognitiveScale which leverages Profile-of-One™ information and integrates with existing chat services. The solution delivers

insights based on only the most relevant news from the best sources, with feedback continuously learned directly from the analyst.

Analysts gain advantage from hyper-personalized and context-based insights driven by efficiently synthesizing internal data, news and other external data. The result is superior client service, and increased bank revenues.

Improved research quality through machine-generated insights powers timely and higher-quality investment decisions and

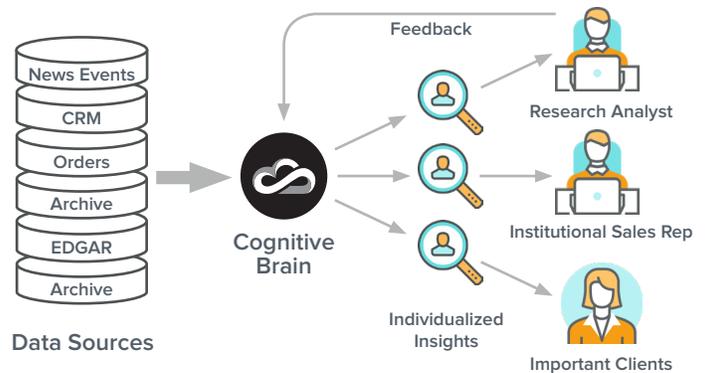


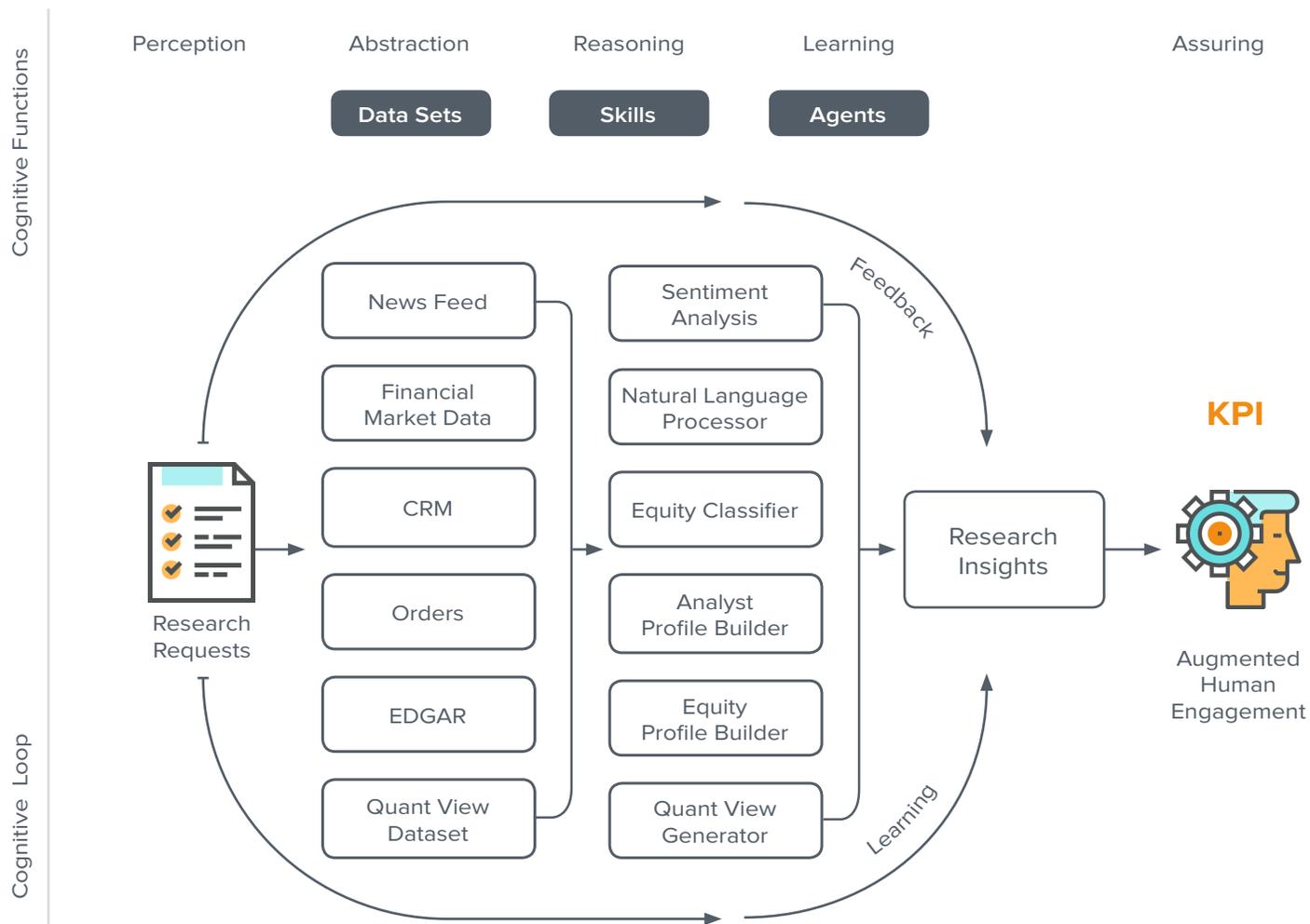
Figure 2: Improved research quality via machine generated insights

customer experience.

IMPACT

- **Automated smart push of insights** replaces the manual pull of external news and easy-to-miss internal data
- **Continuously improves** by learning from researcher's expertise
- **Faster and more thorough insights** better leverage the bank's research advantage

Research Assistance Agent Anatomy



SEE
a number of different research requests

KNOW
relevant news feeds, market data, and other key information

ASSIST
by providing research insights based on machine intelligence

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 Cortex 5 software helps businesses apply Artificial Intelligence and Blockchain technology to solve complex business problems at scale for financial services, healthcare, and digital commerce markets.

Our award-winning software is being used by global leaders such as USAA, Morgan Stanley, NBC, JPMC, ExxonMobil, Dell Technologies, and MD Anderson 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, Microsoft Ventures, and USAA.

For more information on the company, please visit us at cognitivescale.com and follow @cognitivescale on Twitter, Facebook and LinkedIn.

Contact an AI specialist at cognitivescale.com/contact