

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 if available. Individual investors and traders receive hyper-personalized insights and intelligence, driven by a customer Profile-Of-One™.

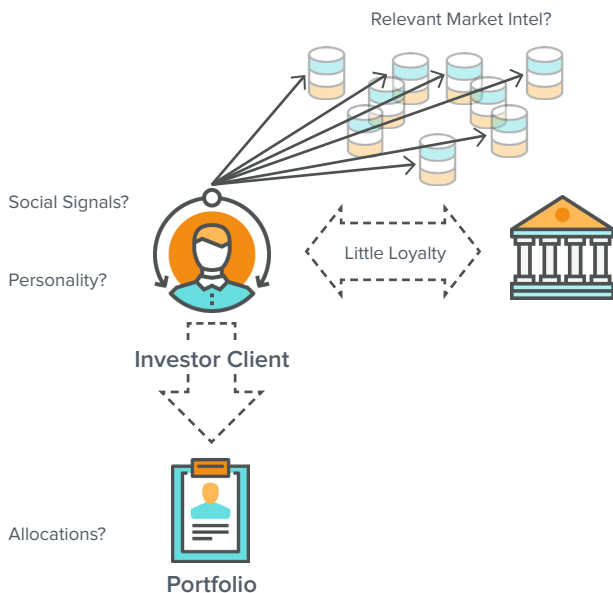


Figure 1: Clients struggle to access and filter investment options that best match their behavioral profile and trading strategies

The software focuses on the “what and when” of trades, anticipating a trader’s needs, analyzing triggers from in app behavior and feedback, and providing them with higher-value insights.

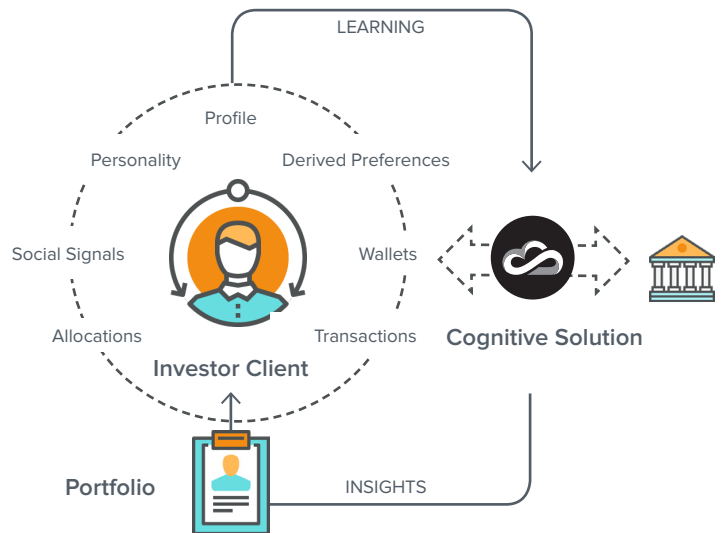


Figure 2: Relevant market/trading insights for clients using highly personalized and powerful behavioral profiles based on their historical trading styles.

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