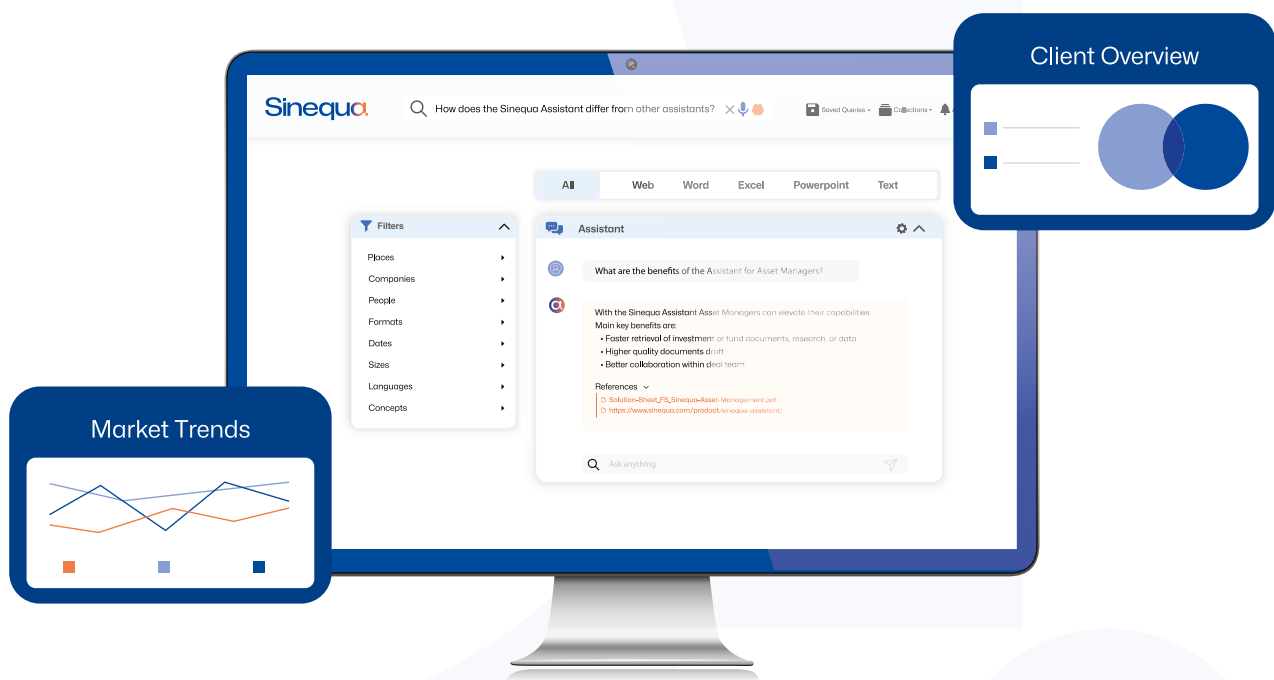# Financial Analysts and Asset Managers. Augmented.

Introduction

Today's banking and asset management markets are more diverse and interconnected than ever before. U.S. investments are traded overseas long after the markets close in New York and Chicago. Trading in stock index futures has increased volatility in global stock markets. Currency fluctuations are influenced by current events and governmental actions worldwide. The common element tethering this vast financial ecosystem is and will always be data.

Banking and finance data, both structured and unstructured, come in all shapes and sizes, including transactions, trade records, credit/debit card histories, customer inquiries, call logs, and online interactions stored and shared across hundreds of thousands of databases and data centers worldwide. U.S. banks alone store more than an estimated 1 exabyte of data.

In this data-intensive environment, financial research analysts and other knowledge workers experience a cognitive burden caused by the extra effort required to evaluate unclear options and make optimal decisions. This burden escalates when workers face unclear choices and ambiguous information, directly impacting the efficiency of financial organizations.

To address this challenge, companies are using Generative AI and search-powered GenAI to evolve from being «data-driven» to «insight-driven.» This shift leverages context and connections across the enterprise digital landscape. Those who fail to evolve risk missed opportunities and avoidable mistakes that can jeopardize their operations and customers. With the help of Sinequa, leading financial companies are adopting an information-driven approach powered by GenAI that alleviates cognitive burden, enabling better decisions, improved customer service, and the discovery of new revenue sources.

Transform Financial Data into Actionable Information

Being insight-driven requires relevant data to be intelligently and securely processed into actionable information within the context of the work at hand and aligned with the organization's goals. This process varies greatly by financial institution. For example, as asset managers strive for excellence, Sinequa offers an innovative approach, seamlessly integrating advanced AI and NLP technologies to expedite financial search workflows. More than just a tool, Sinequa introduces the capability for conversational interactions with content, empowering asset managers to engage in intuitive discussions with their data, extracting insights, and making informed decisions in real time.

Insurance companies rely on back-office capabilities to analyze demographics, behaviors, and even meteorological patterns to determine at-risk clients and expedite settlements. Credit card companies require the same capabilities to identify credit risks.

Information that Drives Innovation

The Sinequa platform synthesizes all enterprise banking and finance data in all formats and languages into relevant, secure, and easily accessible information. With Sinequa, critical business processes across banking, insurance, leasing, property management, and asset management are now empowered by information aligned with business tasks and organizational goals.

Sinequa's next-generation platform, powered by GenAI, helps leading financial institutions create instant 360-degree views of their customers, portfolios, investment targets, contracts, financial performance, and any other subject linked to their business. This comprehensive customer view connects relevant information across dispersed applications and repositories, optimizing the customer experience.

Sinequa enhances visibility across all business units – from banking to insurance, leasing, property management, asset management, and beyond. This information-driven approach provides intuitive and unified content access across all internal and external data sources, including customer contracts, insurance claims, payment history, email communications, CRM data, policies, processes, and more. Employees no longer need to know where data is stored, in which format, or how to access it.

One Solution, Multiple Financial Landscapes

Sinequa's search approach, combined with GenAI, can be applied across various financial landscapes:

- **Asset Management**: Franklin Templeton selected Sinequa's platform to empower asset and wealth managers to save time, improve portfolio performance, and give their firm a competitive edge with AI-powered search.

- **Retail Banking**: Crédit Agricole, one of the largest banks in the world, launched an ambitious project to deliver a new digital workplace, offering a 360° view of customers to its representatives and customers. The bank's more than 60,000 internal users can know the exact situation of the customer in front of them, finding the most relevant offerings and corresponding procedures. The Sinequa platform is an integral part of this new workplace, providing intuitive access to all relevant information, and delivering impressive ROI in both time savings and increased customer satisfaction.

- **Insurance Companies**: Sinequa's complete and consistent customer views enable the sharing of information across a large network of agencies and brokers. This information helps determine risks based on a customer's behavior, location, and contracts with different business units or subsidiaries.

Key Capabilities of Sinequa Powered by GenAI

- **GenAI Assistant**:
  Sinequa's Search-powered GenAI Assistant gives you everything you need to build and deploy tailored Assistants for your employees. Assistants that can answer any question, perform research, accelerate innovation, serve as a coach or tutor, automate processes, and streamline work. With Sinequa, you choose the content, pick a GenAI model, and (if desired) define the workflow, and you have an AI-powered Assistant that augments each and every employee. Sinequa delivers accurate and traceable results, securely and at scale, on all of your enterprise content.

- **Hybrid Neural Search**:
  Combines NLP-enhanced keyword retrieval with specially developed vector deep learning. Our LLM-based semantic reranker delivers superior accuracy. Optimized orchestration of queries and thoughts through our GenAI Assistant achieves unmatched relevance.

- **Extreme Scalability and Performance**:
  Handle high volumes of structured and unstructured data while maintaining deep analytical capabilities.

- **Natural Language Processing (NLP)**:
  Cutting-edge natural language processing (NLP) and machine learning not only organize but also enrich your content to ensure the best relevance and robust navigation and filtering. NLP fills in missing metadata, extracts entities, classifies content and builds knowledge graphs. Apply standard synonyms or your own ontologies. Use the built-in analytics or add your own.

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- **Strong Security Controls**:
  Designed to support the complexities and multiple security layers of today's enterprises.

- **Contextual Enrichment**:
  Learn and adapt to industry-specific vernacular within the organization's language.

- **Intuitive Presentation Designs**:
  Provides an aesthetically pleasing and understandable user experience that adapts to the user's intuition, ensuring unobtrusive and contextual design.

Trusted and Built on Years of Success and Industry Recognition

Sinequa's expertise and innovation, powered by GenAI, have been forged by years of experience with some of the world's largest projects within Global Fortune 2000 companies. Over the years, Sinequa's approach to information-driven businesses has helped many leading financial and insurance institutions achieve their goals.

As an established player in this market, Sinequa has repeatedly been recognized as a leader in the Gartner Magic Quadrant for Insight Engines and Forrester Wave for Cognitive Search and Knowledge Discovery.

Companies that use Sinequa

... and many more.

About Sinequa

Sinequa transforms how work gets done. Sinequa's Assistants augment your company by augmenting employees with a knowledgeable, accurate, secure work partner so they are more effective, more informed, more productive, and less stressed.

Best of all, Sinequa Assistants streamline workflows and automatically navigate the chaotic enterprise information landscape, so that employees can skip the grind and focus on doing the kind of work that makes the most impact.

Sinequa's Assistants achieve this by combining the power of comprehensive enterprise search with the ease of generative AI in a configurable and easily managed Assistant framework, for an accurate, traceable, and fully secure conversational experience. Deploy an out-of-the-box Assistant or configure a tailored experience and specialized workflow to augment your people and your company. For more information, visit **www.sinequa.com**.

Watch the demo.