



# Financial Markets Analysts Report

## Background

This client is a diversified financial services provider, offering charge, credit and payment card products, travel-related services to retail and corporate customers and card processing, point-of-sale, settlement and marketing services to merchants globally. We were engaged as a strategic partner to minimize the time to generate Analyst Reports through Machine Learning Capabilities. The Bank's analysts used to spend lots of time in looking up information from a huge set of emails every day and those emails contain information on credit, financials & other relevant data of companies. Collating data from a large number of emails creates many problems.

## Challenge

- Huge email & online information dataset
- Limited access to real-time data
- Poor data quality, erroneous inputs, no standard format
- Long cycle-time for reporting and analysis

## Solution

- A comprehensive data extraction tool – with built-in machine learning capability to extract data from emails, generate reports with predefined data elements
- NLP engine allows tool to comprehend contextual meaning of data, assisting automatic report generation
- AI handles performance and mass-data storage without interrupting the tool

## Process



Announcements steps initiated in various forums

Email regarding funding status

Front Desk analysts compiling various reports

Any other unstructured information



- › Metadata Extraction
- › Information Extraction
- › Cross Reference
- › Index Creation
- › Foot Note Mapping
- › Mismatched Content Identification

*A reliable solution for generating high-quality Analyst Reports.*



**FINANCIAL MARKETS  
ANALYSTS REPORT**

Extracts data from emails and generates analyst reports with accumulated data elements.

**Increase Efficiency**  
Analysts can reduce time and effort to open each email, collate all relevant data, and combine them into one complete report.

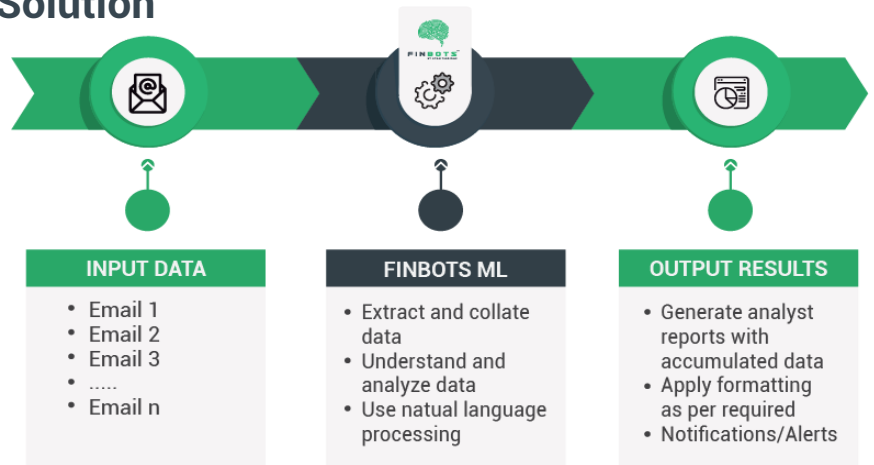
**Enhance Productivity**  
It can help firms to enhance productivity and to reduce costs by quickly analysing and making reports based on contextual understanding of document.

**About FINBOTS**

FINBOTS is a Singapore-based Intelligent Automation firm focusing on Finance, Risk and Operations area. We offer consultancy services on how you can re-imagine the process and use data effectively through Intelligent Automation, Data Science and Machine Learning. We take pride in our integrated approach to intelligent automation. FINBOTS is a part of STRAITSBRIDGE ADVISORS PTE. LTD., Singapore.



**Solution**



**Results**

- **Cost Reduction** – Efficient analysis and generation of reports saves on costs and time by 60-70%
- **Increased Productivity** – Progressive performance based on full time contextual understanding and freed resources
- **Enhanced Data Capture** – Extracts & processes corresponding financial numbers accurately eliminating manual data retrieval process
- **Minimal Errors** – Reduced errors and omissions of up to 100%

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