

# AI AGENTS TRANSFORM FINANCIAL DATA PROCESSING

Speed, Accuracy, and Automation Redefined

 botminds.ai

No Code AI Platform

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To rapidly create AI Solutions

## ABOUT CLIENT

- ▶ A global leader in private market data and investment insights, serving asset managers, investment firms, and financial professionals worldwide.

## BUSINESS SCENARIO

- ▶ The institution processed between 150,000 and 200,000 documents annually, with a monthly volume exceeding 14,000 documents. Their existing workflow relied heavily on manual processing methods, which created several critical business challenges.
- ▶ The manual approach proved time-consuming and susceptible to human error, while also requiring significant personnel resources.
- ▶ Furthermore, the lack of automated systems and integration capabilities with external data sources severely constrained the organization's ability to scale operations effectively while maintaining data accuracy.

Processing over **150,000 regulatory filings, financial statements, and investor reports** annually across **30+ languages** and various formats, the manual approach led to **inefficiencies, delays, and a higher risk of errors** in extracting critical financial insights

## BUSINESS CHALLENGES

### 01

#### Manual Data Processing Overload

Processing 150,000+ financial documents annually through manual workflows led to inefficiencies, delays, and increased operational costs.

### 02

#### Data Accuracy and Validation Gaps

Ensuring the accuracy of extracted data and maintaining a reliable linkage back to source documents proved challenging with manual methods.

### 03

#### Global Document Diversity

Handling diverse financial document formats and languages from multiple countries added complexity to data extraction and standardization.

### 04

#### Scalability and Resource Constraints

Growing volumes of data, coupled with limited resources, hindered the ability to scale operations effectively and meet business demands.



## SOLUTION CONSIDERATIONS

The organization required a transformation strategy focusing on four essential dimensions.

- ① **Automation-First Approach** :Implementing an AI-powered solution to automate data extraction, validation, and linkage to improve efficiency and reduce manual intervention.
- ① **Multilingual and Multiformat Compatibility** Ensuring the solution can process financial documents in various languages and formats to address global operational needs.
- ① **Data Traceability and Accuracy**: Developing a mechanism to link extracted data points back to their exact locations within source documents for validation and compliance.
- ① **Scalability and Integration**: Designing a scalable system capable of processing high volumes of data while seamlessly integrating with external APIs and internal workflows.

## BOTMINDS SOLUTION

- ✓ Botminds deployed AI-powered automation to extract key financial metrics from documents, including EBIT, EBITDA, and revenue data. The system automatically computes derived metrics while maintaining transparent calculation methodologies.
- ✓ With support for over 30 languages, the solution effectively scales across global operations. The implementation features an intelligent hyperlink system that connects extracted data points to their source locations, ensuring complete traceability.
- ✓ The solution to incorporate real-time monitoring with automated alerts for data inconsistencies, enabling prompt resolution of any discrepancies. Through API integrations with more than 20 global registries, the solution automates the retrieval and processing of regulatory filings, maintaining detailed timestamp records for audit purposes.
- ✓ To achieve 99% accuracy, the system employs a Human-in-the-Loop framework for validating low-confidence extractions. A comprehensive analytics dashboard to provide real-time visibility into document processing status and performance metrics, enabling data-driven operational decisions.



## SOLUTION HIGHLIGHTS

- State-of-the-Art (SOTA) Gen AI models to accurately extract critical financial metrics, while supporting over 30 global languages.
- Automated Computation and Documentation of derived financial metrics such as depreciation and net income.
- Inbuilt hyperlinking mechanism to link extracted financial data to precise PDF coordinates within source documents enabling comprehensive traceability and simplified validation workflows for compliance and accuracy.
- Integrated APIs to directly retrieve filings from over 20 global regulatory registries to the database with timestamped tracking for audit-readiness.
- Scalable Accuracy with Human-in-the-Loop verification for low-confidence extractions, achieving a robust 99% accuracy rate.
- Dynamic Monitoring and Analytics Dashboard- a state-of-the-art dashboard for real-time tracking of document processing progress and performance metrics.

## BUSINESS IMPACT



### Enhanced Efficiency

Reduced processing time by 70%, enabling quicker access to financial insights. Lowered operational costs by automating previously manual tasks.



### Improved Data Accuracy and Compliance

Achieved 98%+ accuracy in data extraction and linkage, ensuring reliable auditing and decision-making.



### Faster Time-to-Insights

Streamlined extraction workflows delivered actionable financial insights within five business days.



### User Empowerment

Enabled Client's analysts to focus on strategic decision-making rather than manual data handling.

## VALUE DELIVERED

**98%**

Data Accuracy

**5x**

Cost Reduction

**20%**

Reduction in Compliance  
Overhead

**30+**

Multilingual capability

**60%**

Increase in Efficiency

 **botminds.ai**



AI-First  
Approach



No-Code  
Platform



Vertically  
Integrated



End-to-End  
Automation

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