

# SUCCESS STORY 1

## Data Insights for An Investment Firm



**Providing Data Insight Solution for a leading alternative investment firm**

Developing a Knowledge Management system for a financial institution involves creating a centralized repository for organizational knowledge. This project also includes implementing an advanced Large Language Model (LLM)-based SQL agent to translate user queries from natural language into precise SQL queries, enhancing data accessibility and efficiency in decision-making.

### Key Achievements



### Good Impact

**- 30% in time**



#### Increased Efficiency

Our AI chatbot has achieved a remarkable 30% reduction in response time, significantly enhancing efficiency and user experience..

**92% Accuracy**



#### Improved Accuracy

Our AI chatbot boasts a notable accuracy level of 92 out of 100, reflecting its strong performance and reliability in handling user interactions.

**+ 40% in user satisfaction**



#### Enhanced User Experience

40% Increase in user satisfaction ratings following integration.

**96% consistency**




#### Consistency Level

Our AI chatbot is an outstanding 96 out of 100, highlighting its reliable and steady performance in interactions.


# Success Stories

## Data Insights for An Investment Firm (Cont.)






+ New Chat
Upload File/ Folder
Add Connector


HV


- Market Insight
- Sales Reports 2023  
2024-02-13
- Customer Research  
2024-02-15
- Investment plan 2024  
2023-02-20
- Customer assessment
- Market trend
- Business Plan

### Users

Total account



**1,536 online**



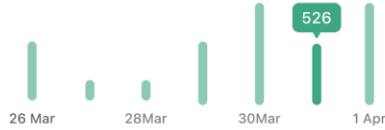
**820 offline**

**Total: 2,356**

### Conversations

Total created: 3,368

Last 7 days ▾



### Feedbacks

Feedback for IVY in Mar 2024

80%

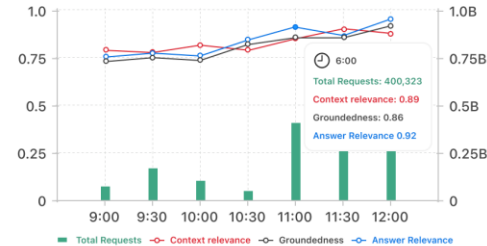
3425 Positive feedback

645 Negative feedback





### System Metrics

Track & Control system performance

Every 3hours ▾




#### Average performance




-  Total request: 1,449,979
-  Answer relevance: 0.92
-  Context relevance: 0.89
-  Groundedness: 0.91

### Market Insights

The newest market insight for decision-making




#### Overview


-  Highest: 1.08529
-  Lowest: 1.08528
-  Change: 0.00001

### Data


This month ▾




**25,236**  
Documents



**23**  
Datalakes





**36**  
Datawarehouse



**23**  
Websitedata

#### New Uploaded


- 


**Marketing strategy 2024**  
09:35 12-03-2024
- 


**Sales report Jan 2024**  
12:23 12-03-2024

### News

News ▾

- 

**India's Blowout 8.4% GDP Figure Masks Signs of Slower Growth**  
Bloomberg : 12:35 01-03-2024
- 

**China's economy suffers blow as factory activity slows**  
Financial Times : 09:35 01-03-2024
- 

**Bayer CEO calls drug group 'badly broken' as he holds off split**  
Financial Times : 07:35 01-03-2024

# SUCCESS STORY 2

## Report Analytic for A Financial Service Company



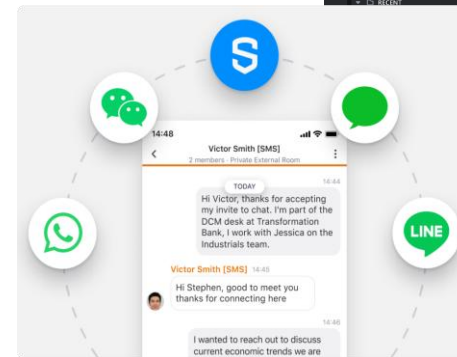
The most secure and compliant collaboration platform deployed by the world's largest financial firms

### P PRODUCT

**Key Features:** End-to-end encryption, compliance tools, integration capabilities, real-time communication (messaging, voice, video), and cross-organizational communication (federation)

The **cloud-based messaging and collaboration platform** that connects markets, organizations and individuals, securely. For the financial services industry:

- Sales and Trading
- Analysts, Operations, Legal
- Portfolio Managers
- Executives
- Hedge Funds, Asset Management
- Insurance
- Law Firms



### Client Profile

**Industry** Financial Services

**Business** Collaboration, Integration, Compliance & Regulation

**Employees** 697

**Countries** Global

**Assets** \$1,41 Billion

### A ACHIEVEMENT

- World-class security & compliance to industry standards.
- Personalized notifications for real-time updates via #hashtags, @mentions.
- Streamlined & optimized workflows.
- Increase productivity by being always connected to other platforms via native integrations: Webchat...
- Relationship building, both for internal & external channels

# Case Study - IvyChat on Communication Platform



## Challenges in Financial Analysis



- Time-consuming extract financial metrics
- Labor-extensive finance report analysis
- Effort-intensive market research

## B BUSINESS NEEDS

- Free time from manual tasks like extract key metrics
- Speed up the report analysis process
- Comprehensive AI solutions for Research and Trading

## S AIC'S AI SOLUTION

We offer a tailored AI solution to optimize the finance analysis process:



### Financial Report Analysis

Financial report



### Prompt Suggestions

Provides tailored prompts for different report types



### Charts Visualization

Visualize trends of market with chart/graph through document analysis



### Data Highlights

Highlight extracted text in the preview file component

## B BENEFITS

- **Increased Productivity:** Reduced information searching time by **60%** and enhanced work efficiency
- **Improved Decision-Making:** Faster and more accurate data processing, cutting response times from days to just **2-5 minutes**.
- **Operational Efficiency:** Streamlining workflows across departments allows for smoother operations, leading to better resource utilization and **reduced 30%** operational costs

## Research Analyst



*"I need to extract metrics from **Earning Reports** for financial model updates."*

### Challenges

- Time-consuming
- Error-prone
- Tight deadline for client presentation

### Solution

- Automate extraction (total revenue, net income, EPS...)
- Leverage LLM for data extraction

### Key Results

- Reduce the extraction time to about 40 seconds
- Increase accuracy of data extraction

## Trader



*"I need to analyze **Financial Statement** to understand financial health and future growth prospects."*

### Challenges

- Fragmented Data
- Time-consuming
- Complex calculation

### Solution

- Integrate data from many sources
- Calculate with pre-defined formulas
- Apply Finance LLM for analysis of revenue growth & profitability

### Key Results

- Reduce the report analysis time
- Faster access to actionable insights & enable quicker decision-making

# SUCCESS STORY 3

## Claim Comparison for An Insurance Group



### Company Stats



**Core Services:** Claim Solutions, Insurance Services, Consulting & Technologies



**8,500+**  
Employees



**\$1.4B**  
In Revenue



**PAIN POINTS:** Company faced significant challenges in their claim validation process. The manual review of claims was time-consuming and prone to human error. This process involved:

- Reviewing claim emails from customers.
- Cross-referencing customer policies and policy schemes.
- Verifying accident details and coverage.
- Making final decisions on claim approval or rejection.
- The inefficiency of this manual process led to **delays in claim processing, customer dissatisfaction, and increased operational costs.**



**SERVICES & SOLUTIONS:** To address these challenges, Company implemented AI-first solutions to automate almost the whole system to streamline different processes into a few major ones, leveraging the AI assistants to do the heavy lifting in document processing, validation and support human agents in decision making.

- **Extract Information:** Automatically extract relevant data from claim emails, including customer details, accident information, and claim specifics.
- **Policy Verification:** Cross-reference the extracted data with the customer's policy and policy scheme to ensure accuracy.
- **Coverage Check:** Verify if the accident details fall within the coverage parameters of the policy.
- **Decision Support:** Compare all the information to determine if the claim should be approved or rejected.

# SUCCESS STORY 3

## Claim Comparison for An Insurance Group (Cont.)



### Company Stats



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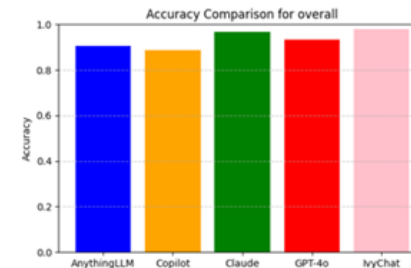
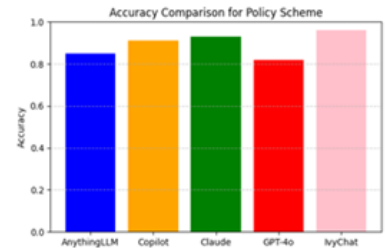
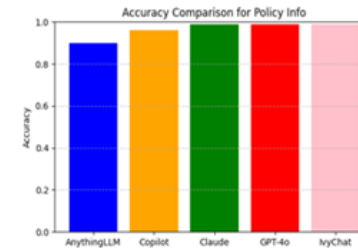
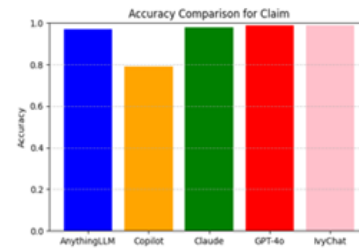
**\$1.4B**  
In Revenue



### RESULTS & BENEFITS:

Bring significant improvements:

- Increased Efficiency
- Enhanced Accuracy
- Cost Savings
- Improved Customer Satisfaction
- Scalability
- **The solution is expected to boost operational efficiency by 60% at the final deployment phase**



| Accuracy Overall |        |
|------------------|--------|
| IvyChat:         | 98.00% |
| Claude:          | 96.67% |
| GPT-4o:          | 93.33% |
| AnythingLLM:     | 90.67% |
| Copilot:         | 88.67% |