

Harness the revolutionary capabilities of AI, GenAI & Agentic AI

Hexaware's Solution for Wealth & Asset Management

Accelerated Solutions



Corporate Finance and Legal GPT



Tensai Agentverse for Financial Services – Investment Reporting



Analytics for WM

Core Offerings for AI

Innovation



Empowers organizations to scale confidently and adapt to market changes with AI-driven solutions.

Efficiency



Automates complex processes, reducing manual efforts by up to 80% and accelerating decision-making.

Reliability



Ensures compliance and data accuracy through robust governance and secure AI-powered platforms.

Optimization



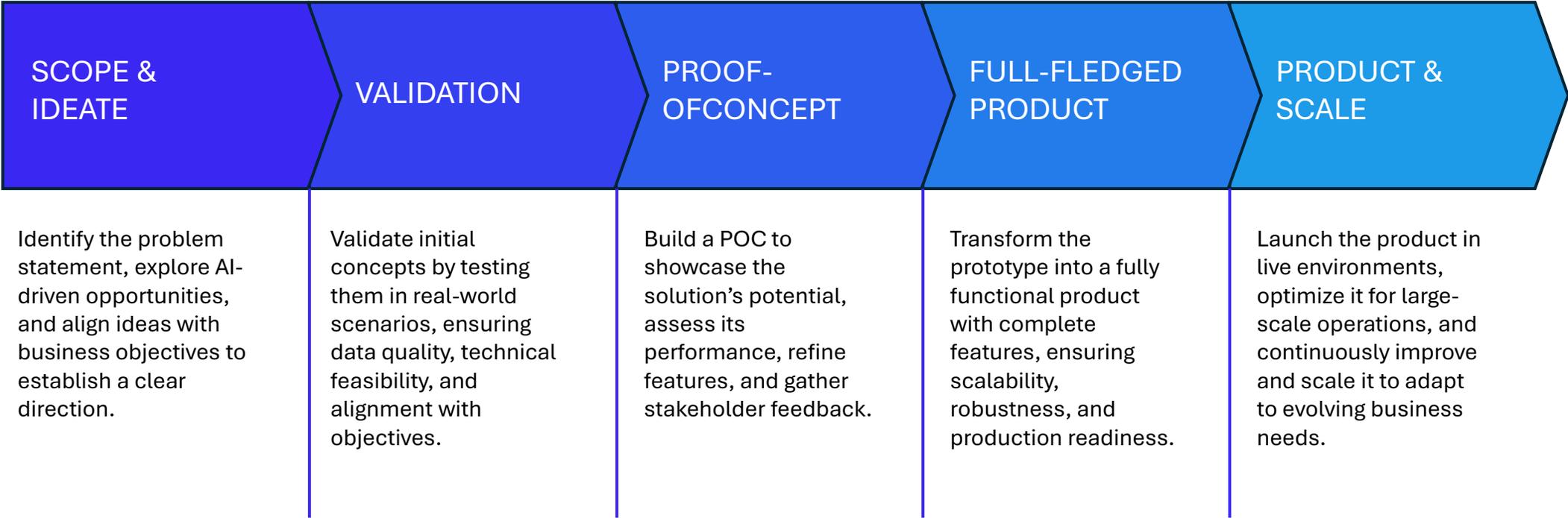
Streamlines operations and reduces operational costs by up to 40% with advanced analytics.

Customer-Centricity



Delivers personalized insights and tailored experiences to enhance client satisfaction and loyalty.

AI Solution Execution Methodology & Accelerators



AI Accelerators



Corporate Finance and Legal GPT

An AI-powered platform streamlines the process of extracting, analyzing, and generating reports on financial data.



Tensai Agentverse for Financial Services – Investment Reporting

Revolutionize the management of investment data by emphasizing Data Ingestion, Data Engineering, and Data Presentation.



Analytics for WM

Integrates client, account, and portfolio data while enabling informed, data-driven decision-making.

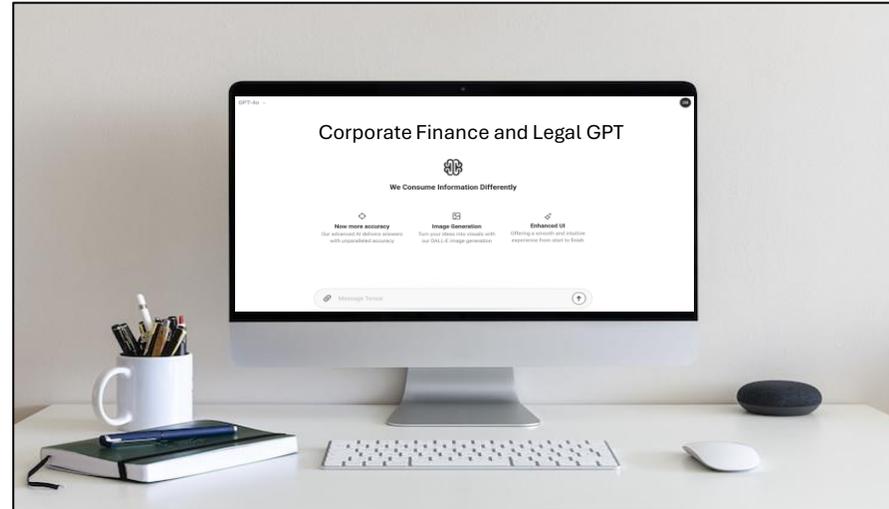
Corporate Finance and Legal GPT

Overview

An AI-powered platform designed to exponentially accelerate the M&A due diligence process that provides real-time and error-free analysis with automated reporting ensuring faster and more reliable processing.

Major Use Cases

- M&A evaluations: extract and summarize payment terms, termination clauses, non-competes to assess risks
- Tax compliance & statutory filings: cross-validate tax returns vs statutory filings, YOY/MOM analysis, due-date tracking
- Discrepancy highlighting & risk flagging: identify missed/delayed filings, calculation of penalties/exposure
- Revenue, Expense and Headcount Analysis: Retrieve and organize data for revenue, expenses and Headcount analysis.



Target Users

- Private Equity firms
- IFC/EBRD like Multi lateral development banks
- Sell side M&A advisory firms

Key Challenges Addressed

- Error-prone manual processing of complex documents
- Difficulties extracting and analyzing financial and legal data
- Compliance risks from missed deadlines and discrepancies
- Lack of real-time insights and scalability limitations

Core Capabilities

- Multi-format support (Word, PDF, Excel) with format detection, parsing and content normalization
- NLP-driven interactive query system for real-time data retrieval
- Efficient clause extraction and summarization (loan, leasing, insurance, tax incentives, employee contracts)
- Audit logs and history tracking for accountability and compliance

Benefits/Outcomes

- Faster, automated processing and reporting
- Improved accuracy and reduced human error
- Enhanced compliance monitoring and timely alerts
- Scalability to process large volumes and deliver actionable insights

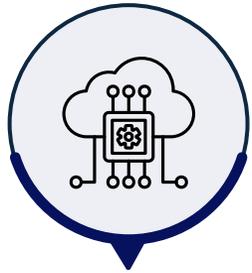
Tensai Agentverse for Financial Services –Investment Reporting

Tensai Agentverse for Financial Services –Investment Reporting is an advanced AI-powered platform that revolutionizes the way investment data is ingested, engineered, and presented.

By leveraging a robust **Enterprise Data Models**, ensuring **data quality**, and incorporating **data catalogs and governance** practices, it empowers investors and financial professionals to make informed decisions.

With integrated **master data management**, cutting-edge data visualization, and streamlined **DataOps and MLOps** capabilities, the platform delivers insights with unmatched speed, accuracy, and clarity.

Core Capabilities



Platform Readiness

Modernize Data Estate

Rapidly transform legacy data platforms to scalable cloud enabled infrastructure

Establish a reliable and unified data foundation

Ensure consistent, high-quality data to feed into AI models, reducing risk and improving decision accuracy.

Trusted Data Foundation



Transforming Wealth & Investment Management with Data Excellence

Strategic Solution:



Streamlined Data Ingestion and Engineering

Implement advanced ETL (Extract, Transform, Load) processes and real-time data pipelines to integrate diverse data sources seamlessly and efficiently.



Unified Enterprise Data Model

Develop a standardized, scalable framework to structure and organize data across systems, enabling better collaboration and insights.



Enhanced Data Quality Management

Deploy automated data validation tools to ensure accuracy, completeness, and consistency, improving the reliability of analytics and reporting.



Comprehensive Data Catalog & Governance

Leverage AI-powered data cataloging to improve visibility into data assets and implement robust governance frameworks to meet compliance requirements.



Robust Master Data Management

Centralize client and portfolio data to eliminate duplication, improve operational efficiency, and provide a holistic view of relationships.



Advanced Data Visualization Tools

Utilize cutting-edge visualization platforms to transform complex datasets into intuitive dashboards and reports for stakeholders and clients.



Operationalized DataOps & MLOps

Adopt scalable DataOps and MLOps frameworks to ensure continuous delivery, operational efficiency, and innovation in machine learning workflows.

Optimus – Analytics for Wealth Management

Overview

Our **Generative AI** framework for Analytics in Wealth Management delivers a modular, open-architecture solution tailored for financial portfolio management. It harnesses advanced analytics and actionable insights to empower financial advisors and firms.

AI-powered Insights

- Leverage advanced AI models to deliver real-time, actionable insights from vast datasets.
- Enable personalized investment strategies aligned with individual client goals and market conditions.

On-demand Reporting Tools

- Create detailed performance reports using intuitive querying tools.
- Monitor portfolio trends, risks, and opportunities in real time.

Unified Data Management

- Metadata dictionary, Data catalog
- Centralize client, advisor, and account data under a single management framework.
- Support seamless integration across platforms for consistent reporting.

Interactive, Real-time Dashboards

- Access centralized dashboards and customize performance metrics
- Generate dynamic reports for portfolios, clients, and accounts.
- Visualize performance across multiple asset classes.

Pre-defined Data Models

- Simplify data ingestion and validation with pre-built, adaptable data models.
- Integrate third-party data sources to improve decision quality.

Regulatory Compliance

- Ensure regulatory compliance through automated, standardized reporting.
- Minimize risks with robust compliance checks and streamlined processes.

Target personas: **Wealth Managers, Financial Advisors**

