

Persistent FinAnalytics Platform



Risk Assessment – Market Opportunity

Target Segment

- \ Corporates (Debt Issuers) / PE firms
- \ Financial Services firms - (incl. Banks, Financial institutions, Insurance firms , NBFCs, Regulators etc.)
- \ Credit Rating Agencies & any Enterprise sales team

Target Persona

- \ Finance Controllers, Rating Analysts
- \ Financial Analysts and/or Credit Analysts
- \ Insurance underwriters

Key Business Challenges

- \ Inefficient financial data recording, financial insights & report generation
- \ Lack of automation in analysis of non-financial parameters of a firm such as competitive strength, management's reliability, macroeconomic factors etc. harnessing credible online sources
- \ Highly time consuming and error-prone manual execution of risk assessment workflow, taking 4-5 days in general
- \ Manual efforts in tracking the variance for regular intervals in the share price of the organizations on regular basis.
- \ Analyzing the market Sentiments whether positive and negative is time taking process and then predicting the share price from the Investor's point of view.

FinAnalytics Platform– Persistent Gen AI Powered Financial Solution Leveraging Azure OpenAI

Pivotal Features

Different Financial Copilot Agents orchestrated into one copilot	Agentic AutoGen Framework using Azure OpenAI	Copilot based chatbot	Financial advice & reports
Generating credit risk score	Calculation of variance of different stock price	Handy investor report and tracking	Market Sentiment Analysis

Unique Value Proposition

Agentic framework for automated routing to copilot agents	Gen AI chatbot for high case deflection	Gen AI driven improvement in service agent productivity	Intelligent Financial credit risk , Investor call & Shareprice reports	Analysing trends & customer sentiment to enhance customer service
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Tech Stack

Azure | Agentic Framework| Copilot | Power Automate|

Azure OpenAI | Azure Dataverse | Web APIs | Azure Function Apps & Logic Apps

Proof Points

A leading Asian digital bank

- 1000+ Customer support users supported
- 24*7 application support
- Successfully Automated the application deployment by using the CI/CD pipeline
- **30-40% Operational efficiency achieved**

A large bank in the UK

- Exploited D365 Customer Service module to implement case management app
- Leveraged Azure Integration Services to automate the exchange of information with Mambu, the core banking platform of the customer
- Harnessed Power Apps to build mobile apps for service request registration
- Leveraged D365 Customer Service Omnichannel chat capabilities for customer communication
- **Resulted in 30% operational cost optimization**

Key Offerings: FinAnalytics Platform



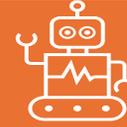
Unified Financial Platform

- Centralized platform delivering comprehensive financial analysis tailored for financial enthusiasts.
- Supports multi-organization reporting with execution speeds 2–3x faster than manual methods.
- Enables real-time access to performance insights, trends, and sentiment-driven metrics in a single interface.



Orchestrator

- LLM-driven orchestration dynamically routes user queries to the appropriate financial agent.
- No manual effort required in generating reports or insights.
- Multiple agents (e.g., credit, risk, investor reports) are integrated into a unified, autonomous copilot.
- Built on Azure OpenAI for scalable, secure enterprise deployment.



Fully Autonomous Agents

- Based on the user query, the LLM-based agentic framework selects and activates the agent.
- The agent executes tasks:
 - Web scraping
 - Analyzing investor transcripts for sentiment and key insights
 - Retrieving and evaluating share price trends
 - Performing market sentiment
- The agent autonomously synthesizes this data into structured, domain-specific financial reports.



Teams & Web Integration

- This solution integrates directly with the Microsoft Teams and includes a custom interface.
- It eliminates the need to navigate elsewhere for specific sessions.

Solution Approach





FinAnalytics Platform Chat

FinAnalytics Platform 7:06 PM



Hello, I'm FinAnalytics Platform, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Chat with FinAnalytics Platform:



Investor Call Report

Browser :

Infosys Ltd

Remarks :

- **Business Updates:**

- Infosys is revising its revenue growth guidance to 4.5%-5% in constant currency terms for the rest of the financial year. - The company is developing over 100 new agents for deployment within clients, focusing on Generative AI. - Infosys plans to continue strong hiring based on discretionary spending, with an expansion of over 5,000 employees in Q3. - Compensation adjustments will occur in two phases, with the first phase starting from January 1 and the second from April 1, impacting margins in Q4 and Q1.

- **Financial Updates:**

Particulars	Current Quarters	Previous Quarters	Q-o-Q	Q4-FY24
<u>Revenue</u> from operations	17,040	15,518	9.81%	18,668.6
Operating profit	2,009	477	22.12%	1,975.5
Operating Profit Margin%	11.79%	10.60%	11.23%	10.58%
Net Profit	1,404	477	194.34%	4,570.1