

COMPANY BRIEFING NOTE

FINANCIAL PROPOSAL – COPILOT STUDIO

INNOVATE. TRANSFORM. SUCCEED.

ADAPT TO THE NEW BUSINESS REALITY.

MARCH 2026

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Global Business Consulting

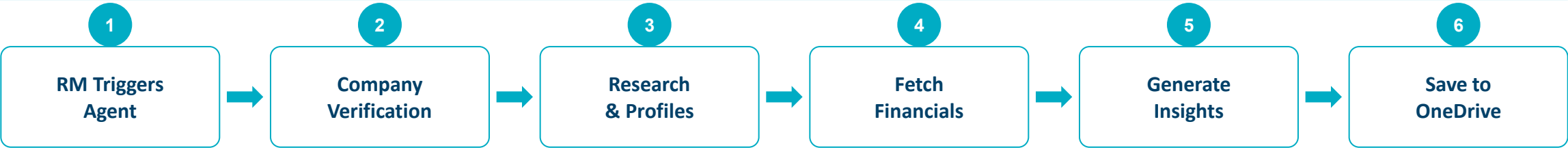
Company Financial Briefing Note Agent

AI agent for RMs to auto-generate financial briefing notes for client meetings with listed Indian companies

AGENT SUMMARY

AI-powered assistant for bank Relationship Managers preparing for client meetings with listed Indian companies. Autonomously researches target company on NSE/BSE, extracts 3 years of consolidated financials, enriches profiles, generates data-backed insights, and saves a professional Briefing Note (.docx) to OneDrive.

HOW IT WORKS



KEY BENEFITS

5 Min Prep

Replaces 3-5 hours of manual research per meeting

Live Data

Always-current info from NSE, BSE, annual reports

Consistent

Bank-approved format for every Briefing Note

BUSINESS OBJECTIVES

- ▶ Reduce pre-meeting research from hours to under 5 minutes
- ▶ Bank-approved, consistent briefing structure every time
- ▶ Data-backed analysis: revenue CAGR, margins, leverage ratios
- ▶ Auto-save to OneDrive as ready-to-use Word document

KEY CHALLENGES

- ▶ Multi-source live data dependency (NSE, BSE, LinkedIn)
- ▶ Financial unit standardisation (Crores/Lakhs to Millions)
- ▶ Consolidated vs. standalone financials detection
- ▶ OneDrive integration reliability with fallback handling
- ▶ Source credibility governance (verified sources only)

OUTPUT: Briefing_Note_[Ticker]_[Date].docx | Company Overview | Representative Profiles | Shareholding | 3-Year Financials | Analytical Insights

Company Financial Briefing Note Agent – Architecture Agent Flow

End-to-end agent workflow: from RM input collection through web research, financial analysis, and automated document generation

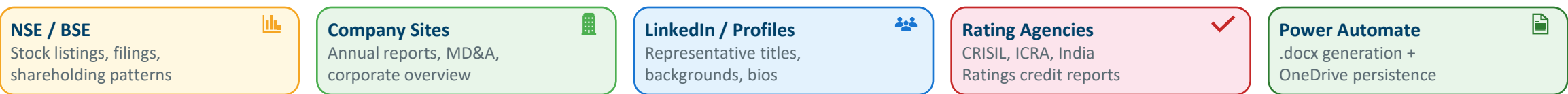
CHANNEL LAYER



AGENT PROCESS FLOW



DATA & SERVICES LAYER



ERROR HANDLING & QUALITY GATES



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