



# Squirro for Financial Services

Turn your vast and costly data into opportunities

Corporate financial services firms have access to more data than ever before, much of it coming from premium providers. Up to 99% of this data is never used and remains inaccessible for business users.

With Squirro's augmented intelligence solutions, you are able to unlock the power of all your data! Find deal opportunities ahead of your competitors, get actionable recommendations and relevant talking points, and utilize the 360° client insight dashboards to bring your client understanding and interactions to the next level.

## HOW IT WORKS



### GATHER

various data sources in one dashboard



### UNDERSTAND

your business needs and extract key insights



### ACT

on opportunities that emerge in real-time

## EXTERNAL DATA SOURCES

- Breaking news
- Event transcripts
- Premium data providers
- News feeds
- 10K/Q filings
- Research reports

## INTERNAL DATA SOURCES

- CRM systems
- Call and meeting notes
- Shared mailbox & newsletters
- Internal research
- Internal pitchbooks



## HIGHLIGHTS

- Deal origination
- Counterparty recommendations
- Relationship map
- Pitch insights
- 360° client cockpit



## BENEFITS

- Improve profitability and efficiency
- Increase revenue and uncover hidden deals
- Strengthen client relationships
- Get quicker client and market insights
- Reduce time to analyze data



## ACHIEVEMENTS

- 6-month early notice on potential deals
- >50 deals uncovered in first 30 days
- >90% accuracy
- Improved ROI on premium data
- Increased adoption rate of CRM system

EXPLORE

# Augmented Intelligence Solutions for Financial Services



## INVESTMENT BANKING

Source more deals, enhance your clients' experience and find prospective counterparties prioritization; + 5% revenue



## CORPORATE & INSTITUTIONAL BANKING

Originate sales leads through strong talking points



## INSTITUTIONAL ASSET MANAGEMENT

Increase your assets under management and understand better clients and prospects



## WEALTH MANAGEMENT

Enhance the client acquisition and retention, and unearth portfolio allocation opportunities



## SQUIRRO FOR REFINITIV

Fully leverage your premium data investments



## REAL ESTATE FINANCE

Originate more deals

OUR CUSTOMERS

## Companies Trusting Squirro



### ABOUT SQUIRRO

Businesses capitalize on new opportunities, improve client relations, and optimize decision-making capabilities using Squirro's vertical-specific Augmented Intelligence solutions, which combine human intelligence with powerful AI. An Insights Engine at its core, Squirro delivers contextualized insights from your most relevant data sources and displays them directly, via workbench integrations, or through self-service applications.

Squirro works with global organizations, primarily in the Financial Services, Insurance, Telecommunications, and Manufacturing industries. Customers include Bank of England, Standard Chartered, ING, Brookson, Ninety-One and Candriam. Founded in 2012, Squirro is currently present in Zürich, London, Munich, New York, and Singapore. Further information about AI-driven business insights can be found at [squirro.com](http://squirro.com)

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### LEARN MORE ABOUT SQUIRRO FOR FINANCIAL SERVICES

