

Squirro for Corporate Financial Services

Corporate & Institutional Banking

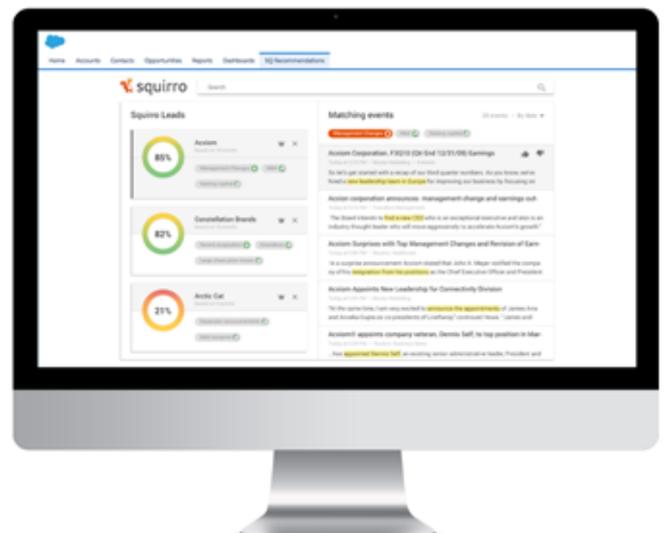
In today's modern world, bankers need to embrace the next generation of artificial intelligence technologies to achieve greater profitability. We now see bankers augmented through the harvesting of unstructured data - such as data found within customer relationship management systems, news feeds, call notes, price data and more - with AI applied to identify patterns, gain insight and drive action. Finding and acting on business opportunities buried within such data is the key to the success of the corporate banker of today and tomorrow.

To win business, bankers must be able to identify the early signs of a potential deal or a need for new capital, and need to do so fast enough to approach the client before one of their competitors does. That's why **Squirro for Corporate Financial Services** is an essential solution for them, delivering deep customer insight and increased business opportunities, ultimately resulting in better profitability.

Squirro for Corporate Financial Services is an AI-driven solution that offers deep analytic power, taking in structured and unstructured data to generate data-driven insights. It ensures corporate bankers can:

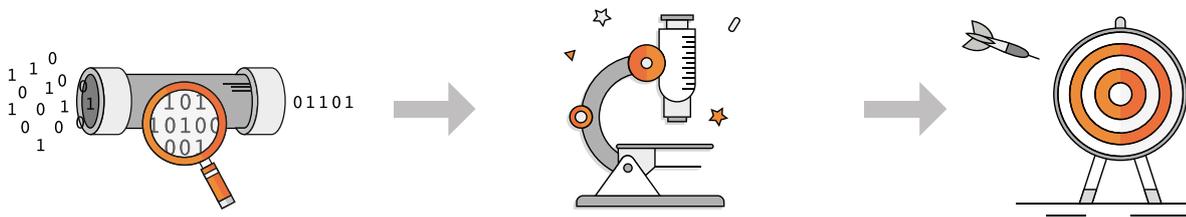
- **Source opportunities faster and more accurately** - Banking is an intensely competitive industry, and the need to identify strong opportunities before anyone else does is acute. Because Squirro manages such wide and varied volumes of structured and unstructured data - a CEO talking about a possible restructuring, an aside captured in a call note - it provides a true understanding of exactly what is happening in a market. This understanding means users can unearth new leads and deals as they happen, opportunities that they otherwise would not know existed.
- **Match the right products to the right customer** - Squirro can sift through vast amounts of structured and unstructured data and apply its AI-driven Recommendations Engine to identify the best matching product offering for a particular customer or prospect. This allows a more pro-active approach to client management, while also recommending the best action to take when initiating a customer conversation.

- **Identify relevant events and catalysts** - There are so many factors that can trigger a deal or opportunity in corporate finance, that managing and tracking them can feel like an impossible task. Significant events and catalysts useful for sourcing new opportunities can be identified across massive amounts of unstructured data. Squirro helps identify which events lead to bankers being able to supply financing and win new business. When it finds one, it creates a catalyst, which is an opportunity for the banker to win new business.



HOW IT WORKS

Most data used in corporate finance is structured. But the really insightful data is unstructured, which is where **Squirro for Corporate Financial Services** truly excels, extracting fresh and insightful meaning from it. This helps to deliver a deeper understanding of clients, market conditions, and crucially, potential opportunities.



SOURCES

- Meeting notes from CRM
- News articles
- 10K/Q filings
- Earnings call transcripts and presentations
- ...

CATALYST DETECTION

- Recent or Announced Expansion
- Investment in Assets
- Company has FX activity
- Registers branch office in foreign country
- Large new win announcements
- Plans to raise capital
- Management changes
- Capital Structure changes

AI-DRIVEN RECOMMENDATIONS

- Potential client leads
- Product recommendations for each client or new lead



CHALLENGES

- Find and win new business sorting through vast amounts of corporate data
- Discuss very large transactions without a complete view of the client
- Stay on top of industry trends



SOLUTIONS

- Get alerts for new sales opportunities pushed to you
- Match the right products to each opportunity with AI-driven recommendations
- Automatically identify relevant events and catalysts



BENEFITS

- Increase business opportunities and drive more revenue
- Stay ahead of competition with a streamlined research process
- Use AI-driven recommendations to deliver personalized service to every client

ABOUT SQUIRRO

Squirro provides Augmented Intelligence solutions. Its unique technology marries Artificial Intelligence, Machine Learning and predictive analytics, empowering organizations to transform enterprise data into AI-driven insights. Organizations using Squirro take advantage of its ability to source leads and recommend the next best action in an automated way. Its real time 360 degree client cockpit provides a holistic and comprehensive understanding of the customer journey. Squirro's applications for Corporate Financial Services, Insurance and Manufacturing are successfully used by leading global organizations, such as ING, Investec, Helvetia, AXIS Re, Sony and Bühler. Founded in 2012, Squirro currently has offices in Zurich, London, Munich, New York, San Francisco and Singapore.