

Squirro for Corporate Financial Services

Investment Banking

Banking is a fast-paced and relationship-driven industry. To find new business, bankers must be able to stay on top of trends in the industry, and pay close attention to comments that their clients make publicly and in private conversations. 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.

In a world of big data, staying on top of all this is a challenge. With **Squirro for Corporate Financial Services**, investment bankers can now win more business by reacting faster to new AI-driven leads, be confident they know everything they need to know regarding their clients, and can recommend the very best course of action to them.

IMPROVING THE BOTTOM LINE

Investment bankers are typically involved with helping clients raise capital through equity, bond and syndicated loan offerings, providing mergers and acquisitions (M&A) services. But missing out on deals and opportunities is commonplace, while fulfilling those mandates also requires an enormous amount of work. As a result the bottom line suffers.

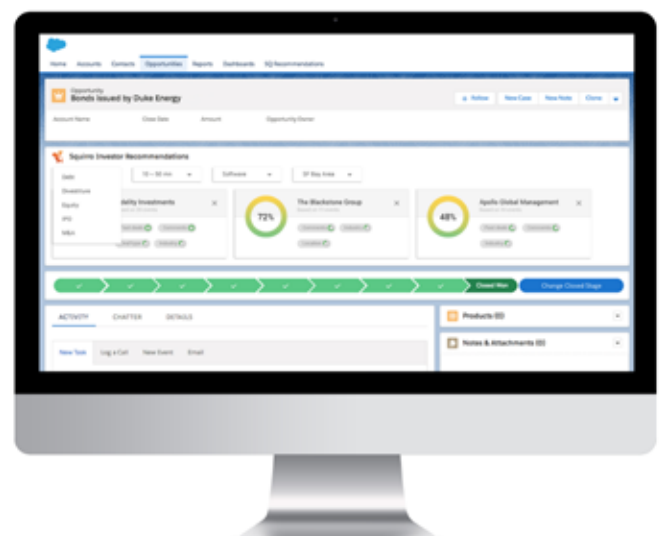
Squirro for Corporate Financial Services addresses these challenges head on. This app is used to support the investment banking origination process in which bankers identify and win mandates to help their customers buy/sell other companies and raise funds from the capital markets through equity, bonds, and syndicated loan offerings.

It allows bankers to:

- **Detect signs of Potential Deals** - With Squirro, the relevant sources of information are continuously monitored for signs of potential deals. Any event that could lead to a new transaction is automatically identified and pushed right to the investment banker, upon which he can decide whether to act – by making a customer call or setting up a meeting – or not.
- **Facilitate Deals** - Squirro is the engine for the whole deal fulfilment process. It saves hundreds of man hours on research, finds potential investors, buyers or sellers.

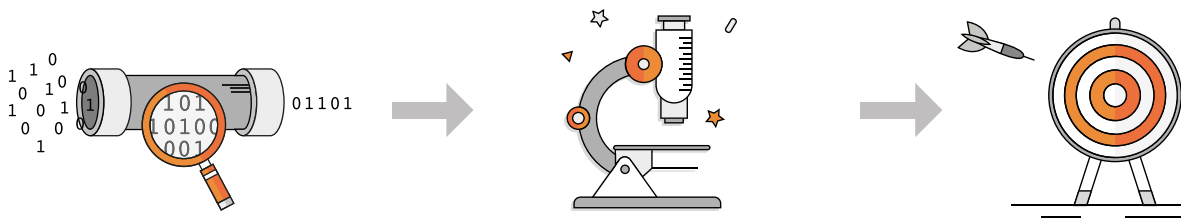
Squirro for Corporate Financial Services knows how to identify the best potential transaction counterparts, be that a funder, an acquirer or a company seller and can explain why it suggested working with a particular party.

- **100% data unification** - **Squirro for Corporate Financial Services** takes data from multiple sources and uses this to provide investment bankers with huge insight into clients. By unifying siloed data, structured and unstructured, Squirro for Corporate Financial Services offers a 360-degree view of clients and the markets they operate in.



HOW IT WORKS

Most data used by investment banks 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

- Expansion plans
- Company exploring a Merger
- Company exploring an Acquisition
- Company exploring a Divestiture
- Company exploring an IPO
- Plans to raise capital
- Management changes
- Capital Structure changes

AI-DRIVEN RECOMMENDATIONS

- Potential client leads
- Possible transactions
- Potential counter-party match for a transaction (funder, M&A, etc)



CHALLENGES

- Keep winning new business
- Have a thorough understanding of your clients and their recent actions
- Identify a need for capital ahead of your competition



SOLUTIONS

- AI-driven recommendations for potential clients based on recent activity
- Match potential acquirers and buyers for newly issued securities, M&A, etc
- Unified search across all data



BENEFITS

- Source more deals
- Increase customer value
- React to opportunities faster and with more agility
- A 360° view of your customers and their needs

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.