

# Institutional Asset Management Solution

As a result of our automated analysis of data, you will receive data-driven recommendations on underperforming funds, changes in allocations, fund management mutations, movements and trends in markets, and many more actionable insights.

With vast amounts of data and an urgent need for early identification of relevant signals, asset management firms face the very business challenges for which Squirro's Augmented Intelligence solution was designed. Increase the scale of your assets under management by engaging your clients and prospects at the perfect time with the right talking points and product suggestions.

## 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

## SOURCES

- Premium data sources
- Fund data
- Social media
- News articles
- CRM meeting notes
- Emails and call transcripts
- Pitch books and presentations
- Research & marketing docs

## WHAT'S IN IT FOR YOU

- Act faster than your competitors
- Make decisions based on corroborated facts
- Exceed your goals and KPIs
- Drive impactful client conversations
- Minimise room for error
- Increase efficiency and save time



## HIGHLIGHTS

- Identification of relevant signals and opportunities
- 360° client cockpit and fund cockpit
- AI-powered search across any data source
- Automated talking-points and meeting preparation



## BENEFITS

- Increase in the volume of assets under management
- Strengthen client relationships
- Boost individual and team productivity
- Generate actionable insights quickly
- Significant increase in efficiency



## ACHIEVEMENTS

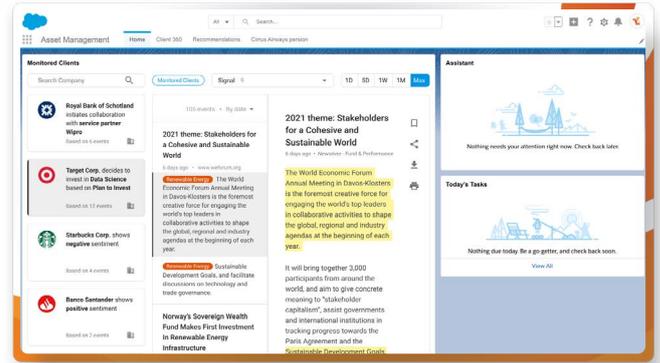
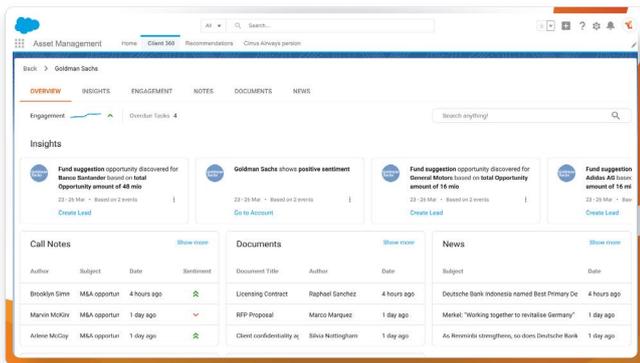
- >50 deals uncovered in first 30 days
- >95% accuracy in identifying relevant signals and new opportunities
- Improved ROI on premium data
- Increased adoption rate of CRM system

## EXPLORE

# Institutional Asset Management

## 1 INCREASE THE VOLUME OF YOUR ASSETS UNDER MANAGEMENT

Squirro's asset management solution drives lead generation by identifying relevant signals from data sources such as Fundmap, Money Media and Morningstar and displaying them in context. This provides automated recommendations on key signals such as identification of underperforming funds, allocation changes and shifts, fund management mutations, movements and trends in markets, and many more relevant insights.

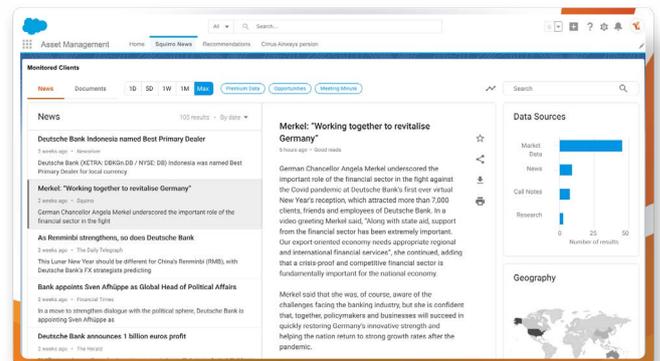


## 2 UNDERSTAND CLIENTS AND PROSPECTS

Squirro's comprehensive 360° client cockpit displays aggregated and relevant data from internal, external and premium data sources to deliver a holistic client view. Deepen your understanding of your customers or prospects and optimize conversation preparation with informed insights provided by our advanced data analytics capabilities. Integrate Squirro with your CRM system for richer contextualized insights.

## 3 INCREASE RESEARCH-EFFICIENCY

Fund managers and institutional asset managers face the daily challenge of increasingly time-consuming research and analysis, primarily due to the ever-increasing volumes of information and raw data. Our cognitive search reduces research efforts by recommending contextual analysis, data and documents to the user that match the research topic, user preferences and other criteria such as "most read", "recommended" or even "required reading".



## OUR CUSTOMERS

# Data-driven financial institutions



## 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](https://squirro.com)

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LEARN MORE ABOUT THE INSTITUTIONAL ASSET MANAGEMENT SOLUTION

