SwissHacks 2024

Financial Innovation with AI

June, 2024

UNIQUE

Supercharging teams
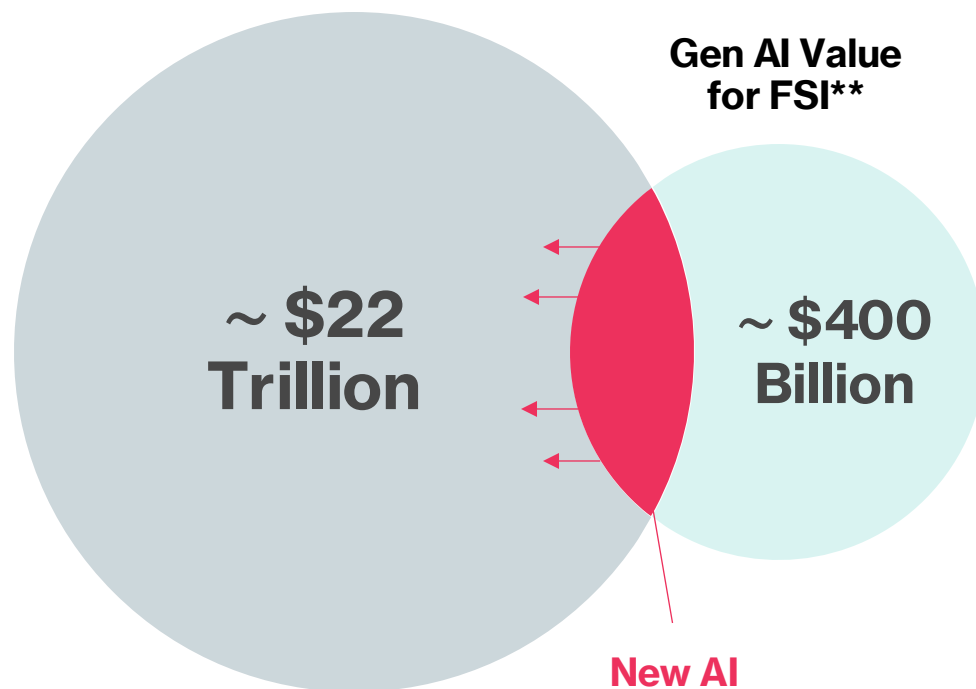
Leverage the power of generative AI to get work done in the Financial Services Industries (FSI)

Problem

- FSI companies have inefficient and ineffective processes*
- Growing financial pressure and need to overcome high costs*
- Changing expectations from clients and competition
- FSI companies fail to drive AI adaption/transformation

Knowledge Workers for FSI (Labor)

Gen AI Value for FSI**

~ $22 Trillion

~ $400 Billion
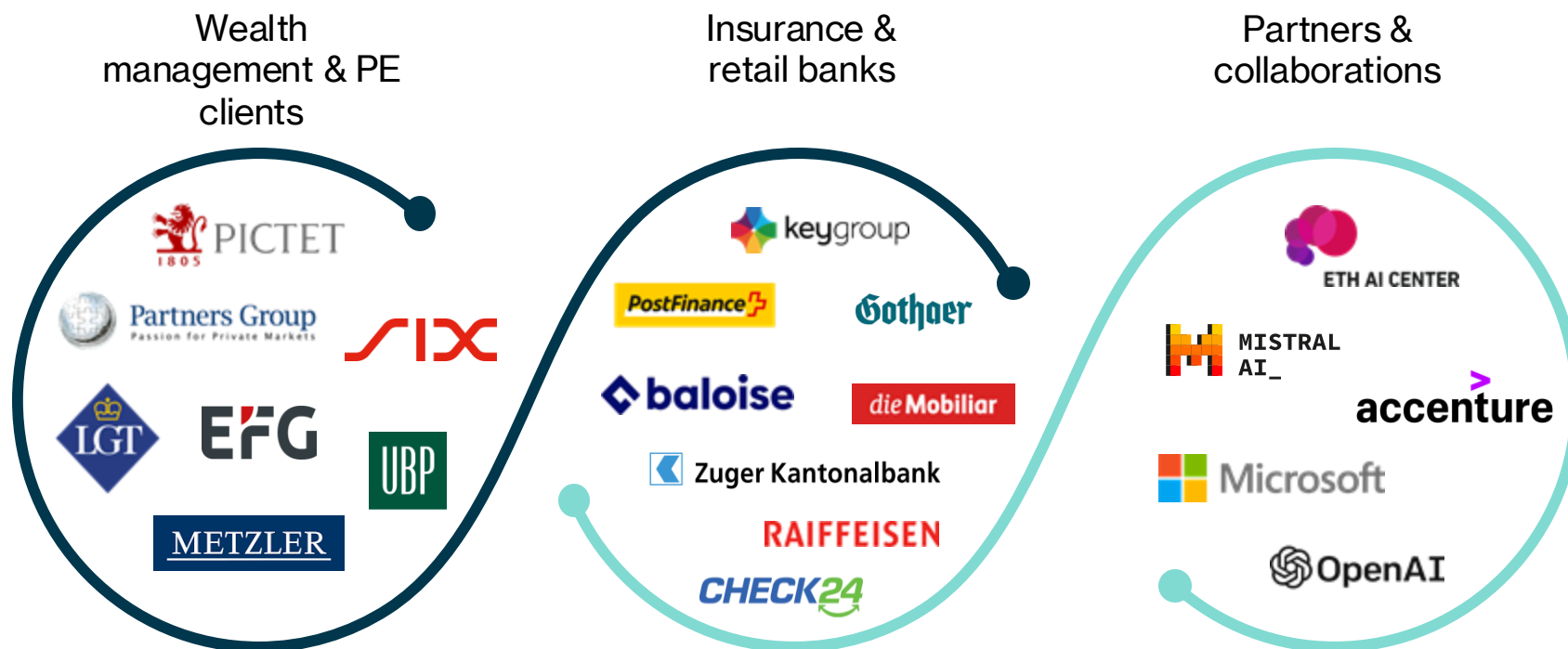
New AI Workforce

Solution

- Drive productivity in an inspiring way
- Replace knowledge worker tasks with AI assistants
- Maximize client-facing time for RMs/advisors by unlocking the power of data
- Fast implementation

* Client case studies conducted with Mobiliar, LGT, Pictet & Goldman Sachs report

** Creating value of $250-410B for banking & insurance according to McKinsey (Link)

UNIQUE

30+ FSI clients
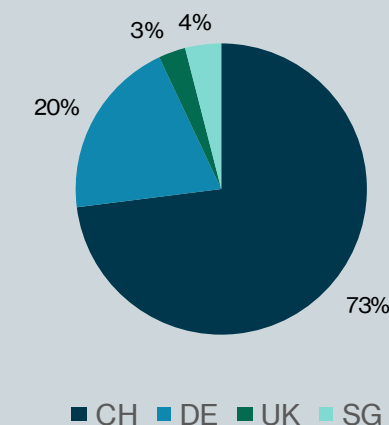
More than 30 FSI leaders trust Unique, making us market leader in CH

CHF 21M raised in Seed Rounds, on our way to raise Series A

Wealth management & PE clients

- PICTET 1805
- Partners Group — Passion for Private Markets
- SIX
- LGT
- EFG
- UBP
- METZLER

Insurance & retail banks

- keygroup
- PostFinance
- Gothaer
- baloise
- die Mobiliar
- Zuger Kantonalbank
- RAIFFEISEN
- CHECK24

Partners & collaborations

- ETH AI CENTER
- MISTRAL AI_
- accenture
- Microsoft
- OpenAI

We are **market leader in Switzerland**, having already won 5 of the top 12 private banks in our home market.

We have a **strong FSI client base** and continue to drive our expansion by acquiring clients outside of central Europe, including clients in Germany, UK, and Singapore.

Pie chart:
- CH 73%
- DE 20%
- UK 3%
- SG 4%

Legend: CH, DE, UK, SG

UNIQUE

Problem / Solution

Problem

Pain Point: Business analysts are drowning in data, struggling to extract meaningful insights from massive annual reports.

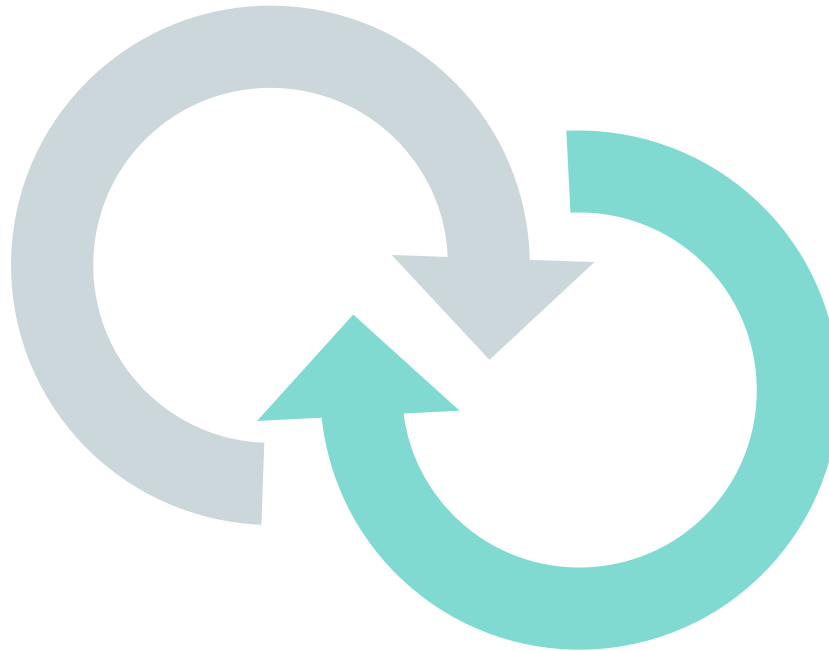**Impact:** Sector-wide comparison and trend analysis become tedious, time-consuming, and error-prone.

Current Situation: Analysts spend countless hours on manual data extraction and comparison, limiting their ability to focus on strategic tasks.

Solution

Innovation: Introducing an AI-powered tool designed to revolutionize data extraction from annual reports.

Efficiency: Automates the extraction and comparison process, drastically reducing the time spent on administrative tasks.

Value: Enhances trend analysis and KPI benchmarking, enabling analysts to focus on high-impact, strategic work.

UNIQUE

The Exciting Challenge

- **Vision**: Envision a world where extracting data from extensive reports is as simple as a few clicks.

- **Scope**: While GPT-4o can handle up to 200 pages, our challenge is to manage reports up to 430 pages for multiple companies.

- **Goal**: Create an innovative solution that automates key data extraction, enhancing the speed and accuracy of financial analysis.

- **Data Format**: Data will be provided in markdown format, utilizing state-of-the-art parsing models for enhanced accuracy and consistency.

- **Technology**: Leveraging OpenAI's flagship model, GPT-4o, alongside cutting-edge open-source libraries to address and solve the challenge effectively.

- **Impact**: Transform the efficiency and accuracy of business analysts.

- **Opportunity**: Engage with real-world problems that have substantial industry impact.

- **Innovation**: Advance the frontiers of AI in financial services, demonstrating both your creativity and technical expertise.

UNIQUE

Join the Challenge

- **Invitation**: Bring your creativity, technical skills, and innovation to solve this real-world problem.

- **Reward**: Winning team gets to present their solution to C-level executives at Unique.

- **Future**: Potential to influence the future of financial analysis.

Stay Unique

Pascal Hauri, PhD
Lead Data Scientist
pascal@unique.ch

UNIQUE