

Leveraging AI to Empower Sales Team

Sales Team in the industry play a crucial role in building and nurturing client relationships. By harnessing the power of AI, these professionals can amplify their capabilities, anticipate client needs, and deliver personalized solutions that drive sales and client satisfaction.

The Challenges Faced by Sales Team

1 Information Overload

Relationship managers must sift through vast amounts of data to understand client needs and preferences.

2 Time Constraints

Juggling client meetings, portfolio management, and administrative tasks leaves little time for strategic initiatives.

3 Personalization Challenges

Providing tailored solutions to individual clients is time-consuming and difficult to scale.



Personalized Recommendations: Tailoring Solutions to Individual Distributors/Clients

Client Profiling

AI can build detailed profiles of individual clients, capturing their unique investment objectives, risk tolerance, and financial goals.

Intelligent Recommendations

Using these insights, AI can suggest personalized investment products, portfolio allocations, and financial strategies.

Enhanced Engagement

Relationship managers can leverage these AI-powered recommendations to have more meaningful, value-added conversations with clients.

Improved Client Retention

Tailored solutions that address individual client needs can help build trust and strengthen long-term relationships.



Pitch Lab

Online AI-driven SaaS platform which fulfils all the needs of Sharp, Business Learning

- AI- driven Speech & Video/Audio Analysis of Detailing
- For On-boarding & Skill Development
- For Self-Improvement
- For Manager Evaluation
- Knowledge Test

[Read more..](#)

VIDEO ANALYSER

Activity Feedback

Analysis Results



Rate of Speech
166
80 min. 2:00 Max

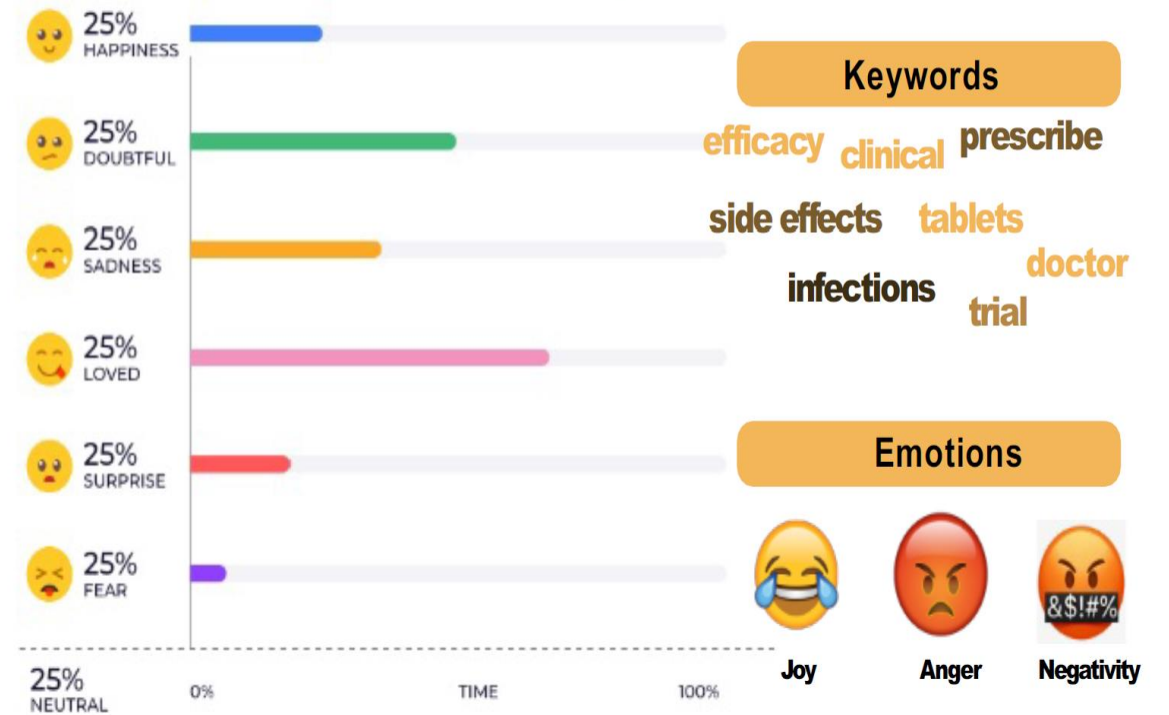
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Duration
1:15
0:30 min 2:00 Max

Comprehension Level
51.9
100 Max



TRANSCRIPTION TOPIC COVERAGE EMOTION ANALYSIS WORD CLO



Investment Portfolio Analyzer

Objective : To Prepare a Crisp Summary Report and Recommendations for the Client Portfolio, based on the current Investments and Instruments present in Portfolio.

By streamlining report analysis, it enhances decision-making efficiency and ensures precise, up-to-date information management .

Input Parameter :

Client Summary Report ,Transaction Report

Organization Strategy Report

Compare and Analyze the above two

Monthly Activity

Key Sections of an Investment Report:

Portfolio Overview: Summarizes current holdings and their value.

Performance Analysis: Shows returns over different periods and compares them to benchmarks.

Asset Allocation: Breakdown of investments by asset class (e.g., equities, fixed income, cash).

Risk Analysis: Measures like standard deviation, beta, and value-at-risk (VaR).

Income & Cash Flow: Details of dividends, interest income, and overall liquidity.

Market Commentary: Analysis of market conditions and their impact on the portfolio.

Investment Strategy: The planned approach, including any changes or adjustments.

Common Recommendations Based on Report Findings:

1.Rebalancing: Adjust asset allocation to ensure it aligns with your risk tolerance and goals.

2.Diversification: Reduce concentration in specific sectors, industries, or geographies.

3.Performance Adjustments: Address underperforming assets or sectors.

4.Risk Management: Implement strategies to mitigate identified risks, such as using derivatives, adjusting position sizes, or increasing cash holdings.

5.Income Optimization: Look for opportunities to increase dividend or interest income if income generation is a priority.

6.Market Outlook Adjustments: Adapt the investment strategy based on the economic and market forecast.

RM - ARN Interaction Activity



- **Business challenge:** RMs are supposed to regularly meet ARNs for discussion business growth opportunities.
 - Currently, identification of ARN to meet and scheduling of meeting during the week is highly ad-hoc.
 - ARNs with potential future growth or lagging relative investment growth with company compared to remaining industry were not being identified properly to meet and explore.
 - Further, No structured way of communication with ARN in the absence of actionable insights.
- **Solution:**
 - Created live connection to internal and external data sources to integrate ARN level and scheme type wise investment data along with SIP/Non-SIP details for both MF and entire industry.
 - Further, built analytical model to replicate the methodological approach provide by senior management to generate Distributor Score Card and RM wise recommendations for ARNs to be visited during coming week.
 - Integrating with NAVs of all MF schemes, generated ARN wise talking points for RMs to highlight concerning scheme where investment potential exist.
- **Result:** Increased efficiency of RMs for ARN engagement and overall business growth

RM - ARN Interaction Activity

Distributor Score Card

3

Distributor Code	Order	Asset Class	Scheme Type	Edelweiss Gross Sales	Ind Gross Sales	Gross Sales Mkt. Share	Edelweiss Gross ex SIP	IND Gross ex SIP	Gross Ex SIP Mkt. Share	Edelweiss Net Sales	IND Net Sales	Net Sale Mkt. Share	Edelweiss AUM	IND AUM	AUM Mkt. Share
5	37	Debt	OTHER DEBT (C)	0	21	0.0%	0	21	0.0%	0	-30	0.0%	0	0	N/A
5	38	Debt	FIXED TERM PLAN	0	174	0.0%	0	174	0.0%	0	-2,308	0.0%	0	327,889	0.0%
5	39	Debt	FUND OF FUND - DOMESTIC	22	24,003	0.1%	18	21,651	0.1%	-92	4,178	0.0%	5,986	2,074,933	0.3%
5	40	Equity	FUND OF FUND - OVERSEAS	43	3,647	1.2%	40	2,598	1.5%	-248	-12,784	0.0%	12,164	546,589	2.2%
5	41	Equity	EQUITY INDEX FUND	386	80,757	0.5%	357	65,839	0.5%	256	44,522	0.6%	10,454	2,369,204	0.4%
5	42	Equity	CHILDRENS FUND	0	1,087	0.0%	0	395	0.0%	0	212	0.0%	0	172,532	0.0%
5	43	Equity	RETIREMENT FUND	10	1,908	0.5%	10	1,141	0.9%	10	-532	0.0%	64	214,960	0.0%
5	44	Equity	EQUITY OTHERS (C)	0	463	0.0%	0	460	0.0%	0	-972	0.0%	0	4,187	0.0%
5	45	Other	OTHER SCHEMES (C)	0	7	0.0%	0	7	0.0%	0	-4	0.0%	0	365	0.0%
19	1	Equity	FLEXI CAP FUND	116	134,212	0.1%	20	103,232	0.0%	-545	-67,324	0.0%	65,432	7,559,865	0.9%
19	2	Equity	FOCUSED FUND	32	62,263	0.1%	13	25,991	0.1%	-29	-60,970	0.0%	1,940	4,441,395	0.0%
19	3	Equity	MULTI CAP FUND	42	96,109	0.0%	27	83,922	0.0%	16	-64,202	0.0%	822	4,345,673	0.0%
19	4	Equity	LARGE CAP FUND	107	168,958	0.1%	30	81,706	0.0%	20	-59,914	0.0%	4,826	10,152,528	0.0%
19	5	Equity	LARGE & MID CAP FUND	4,461	99,035	4.5%	4,115	72,685	5.7%	3,206	16,674	19.2%	75,579	4,117,086	1.8%
19	6	Equity	MID CAP FUND	1,392	96,985	1.4%	1,345	59,897	2.2%	834	19,151	4.4%	26,344	4,087,279	0.6%
19	7	Equity	SMALL CAP FUND	1,620	101,490	1.6%	1,547	55,361	2.8%	1,370	46,225	3.0%	5,240	2,808,415	0.2%
19	8	Equity	VALUE FUND/CONTRA FUND	832	41,535	2.0%	563	32,588	1.7%	-514	13,756	0.0%	76,157	1,949,218	3.9%
19	9	Equity	ELSS	2,727	37,617	7.2%	1,567	14,513	10.8%	2,538	-87,538	0.0%	60,333	7,231,287	0.8%
19	9	Equity	ELSS(C)	0	25	0.0%	0	22	0.0%	0	17	0.0%	0	1,456	0.0%
19	10	Debt	CONSERVATIVE HYBRID FUND	5	5,148	0.1%	1	4,718	0.0%	-19	-2,788	0.0%	925	381,256	0.2%

RM - ARN Interaction Activity

Concerning Scheme

Distributor Code	Asset Class	Scheme Type	Best Performing Scheme	GS MS	Target MS	Message
5	EQUITY	LARGE & MID CAP FUND	Core Equity Fund - Regular Plan - Growth	0.3	1	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Core Equity Fund - Regular Plan - Growth'. This scheme has been outperforming its peers in several key areas: It has delivered an impressive 1-year return of 51%, significantly higher than the category average. The scheme has an expense ratio of 1.9%, which is slightly higher than the category average of 1.95%. The fund size is substantial at ₹4022.92 Cr, indicating better management and research resources. The scheme has a very high risk rating, indicating the potential for very high returns for those willing to take on more risk. The scheme's portfolio is diverse with 95.38% investment in domestic equities, including Large Cap, Mid Cap, and Small Cap stocks. In conclusion, the 'Core Equity Fund - Regular Plan - Growth' is a strong investment option due to its impressive performance, large fund size, diverse portfolio, and high ranking. However, it's important to note that it carries a very high risk and is suitable for investors who are willing to take on more risk for the possibility of higher returns.
5	EQUITY	MID CAP FUND	MIDCAP FUND - GROWTH - DIRECT PLAN	0.3	1	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Midcap Fund - Growth - Direct Plan' stands out due to its strong annualised return of 28.3% over a year, diversified portfolio with 94.68% investment in domestic equities, lower expense ratio of 0.6% compared to the category average, suitability for long-term investment of 3-4 years, and competitive ranking of 6/29 in terms of returns since inception
5	EQUITY	SMALL CAP FUND	SMALL CAP FUND - DIRECT PLAN GROWTH	0.2	1	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Small Cap Fund - Direct Plan Growth'. This scheme has been outperforming its peers in several key areas: 1. It has delivered an impressive 1-year return of 69.35%, significantly higher than the category average. 2. The scheme has a lower expense ratio of 0.43%, which means less cost for managing your money and potentially higher net returns. 3. The fund size is substantial at ₹4994.19 Cr, indicating better management and research resources. 4. The scheme has a very high risk rating, indicating the potential for very high returns for those willing to take on more risk. 5. The scheme's portfolio is diverse with 89.63% investment in domestic equities, including Large Cap, Mid Cap, and Small Cap stocks. 6. The scheme has consistently ranked well within its category, for instance, it ranked 1st in terms of 1-year returns. In conclusion, the 'Small Cap Fund - Direct Plan Growth' is a strong investment option due to its impressive performance, lower expense ratio, large fund size, diverse portfolio, and high ranking. However, it's important to note that it carries a very high risk and is suitable for investors who are willing to take on more risk for the possibility of higher returns. As always, investors should carefully consider their own investment goals, risk tolerance, and time horizon before making an investment decision.

De Growing Scheme

Distributor Code	Asset Class	Scheme Type	Scheme Name	GS MS	NS MS	Message to Distributor
19203	EQUITY	LARGE & MID CAP FUND	Core Equity Fund - Regular Plan - Growth	12.9	0	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Core Equity Fund - Regular Plan - Growth'. This scheme has been outperforming its peers in several key areas: It has delivered an impressive 1-year return of 51%, significantly higher than the category average. The scheme has an expense ratio of 1.9%, which is slightly higher than the category average of 1.95%. The fund size is substantial at ₹4022.92 Cr, indicating better management and research resources. The scheme has a very high risk rating, indicating the potential for very high returns for those willing to take on more risk. The scheme's portfolio is diverse with 95.38% investment in domestic equities, including Large Cap, Mid Cap, and Small Cap stocks. In conclusion, the 'Core Equity Fund - Regular Plan - Growth' is a strong investment option due to its impressive performance, large fund size, diverse portfolio, and high ranking. However, it's important to note that it carries a very high risk and is suitable for investors who are willing to take on more risk for the possibility of higher returns.
19203	EQUITY	MID CAP FUND	MIDCAP FUND - GROWTH - DIRECT PLAN	12.9	0	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Midcap Fund - Growth - Direct Plan' stands out due to its strong annualised return of 28.3% over a year, diversified portfolio with 94.68% investment in domestic equities, lower expense ratio of 0.6% compared to the category average, suitability for long-term investment of 3-4 years, and competitive ranking of 6/29 in terms of returns since inception
19203	EQUITY	SMALL CAP FUND	SMALL CAP FUND - DIRECT PLAN GROWTH	3.6	0	Dear Distributor, I hope this message finds you well. I wanted to bring to your attention the 'Small Cap Fund - Direct Plan Growth'. This scheme has been outperforming its peers in several key areas: 1. It has delivered an impressive 1-year return of 69.35%, significantly higher than the category average. 2. The scheme has a lower expense ratio of 0.43%, which means less cost for managing your money and potentially higher net returns. 3. The fund size is substantial at ₹4994.19 Cr, indicating better management and research resources. 4. The scheme has a very high risk rating, indicating the potential for very high returns for those willing to take on more risk. 5. The scheme's portfolio is diverse with 89.63% investment in domestic equities, including Large Cap, Mid Cap, and Small Cap stocks. 6. The scheme has consistently ranked well within its category, for instance, it ranked 1st in terms of 1-year returns. In conclusion, the 'Small Cap Fund - Direct Plan Growth' is a strong investment option due to its impressive performance, lower expense ratio, large fund size, diverse

Holding Report Hub

1

Data Extraction

The AI application efficiently reads and processes company portfolios in various formats, converting them into a structured and standardized format.

2

Streamlined Data Management

This enables streamlined data management, ensuring accurate and organized information for better decision-making and enhanced portfolio analysis.

3

Informed Financial Strategies

The solution enhances operational efficiency and supports more informed financial strategies.

Report Reading

Introducing our advanced AI application designed for fund managers in AMC companies. This cutting-edge tool reads company reports across various formats, extracting critical data and saving it in structured, easily accessible formats.

Decision-Making Efficiency

By streamlining report analysis, it enhances decision-making efficiency and ensures precise, up-to-date information management.

Fraudulent Reimbursement Claims

The path breaking AI application which automates the review of expense claim documents submitted by employees , leveraging advanced machine learning algorithms to detect anomalies and potential fraud. Leading to a streamlined and accurate expense management process, reducing the risk of financial misconduct within the organization.

Total Claims Processed	Total Amount Claimed	Total Fraudulent Amount	Fraudulent Claims %	Average Claim Amount	Avg Fraudulent Claim Amount
262	197k	74k	24.20%	750.92	1.4k

EMPLOYEE REIMBURSEMENT AUDIT CHECKLIST



1. DETERMINE THE FREQUENCY OF AUDIT & ANALYSE PATTERNS

Chart out the expenses claimed by the employees and spread it across months/quarter/year as you may prefer for your trend analysis. Once you have observed increasing trend, pick up samples from those expense claims. It is advisable to review all the expenses and employee claims rather than picking few samples from each employee.



2. REVIEW THE EXPENSES AGAINST POLICY

Ensure that the expenses claimed are in line with the policies & procedures created by the Organisation. Ensure that the policies are updated and are not conflicting or have any gaps that can be used by the employees.



3. ENSURE THAT THE EXPENSES ARE FOR THE EMPLOYEE

Make sure that the expense claimed is for the employee, and does not include personal expenses. In many cases, personal expenses are clubbed with the business expenses and made to look like a business expense that is inside the rule book of the organisation.



4. ENSURE THE INVOICES ARE ORIGINAL & ARE IN TIME

Make sure that the expense claimed has been supported with sufficient & appropriate evidence. Ensure that the invoices are original. Ensure that the reimbursements are claimed in time as per policy. Always look at the documents with suspicion.



5. IT CONTROLS TO MATCH WITH POLICY

Make sure that the IT controls set in the system are in line with the conditions placed in the policy. There is maker-checker designed in the system and the controls are placed for the upper limits for spends, duplicate checks as necessary.



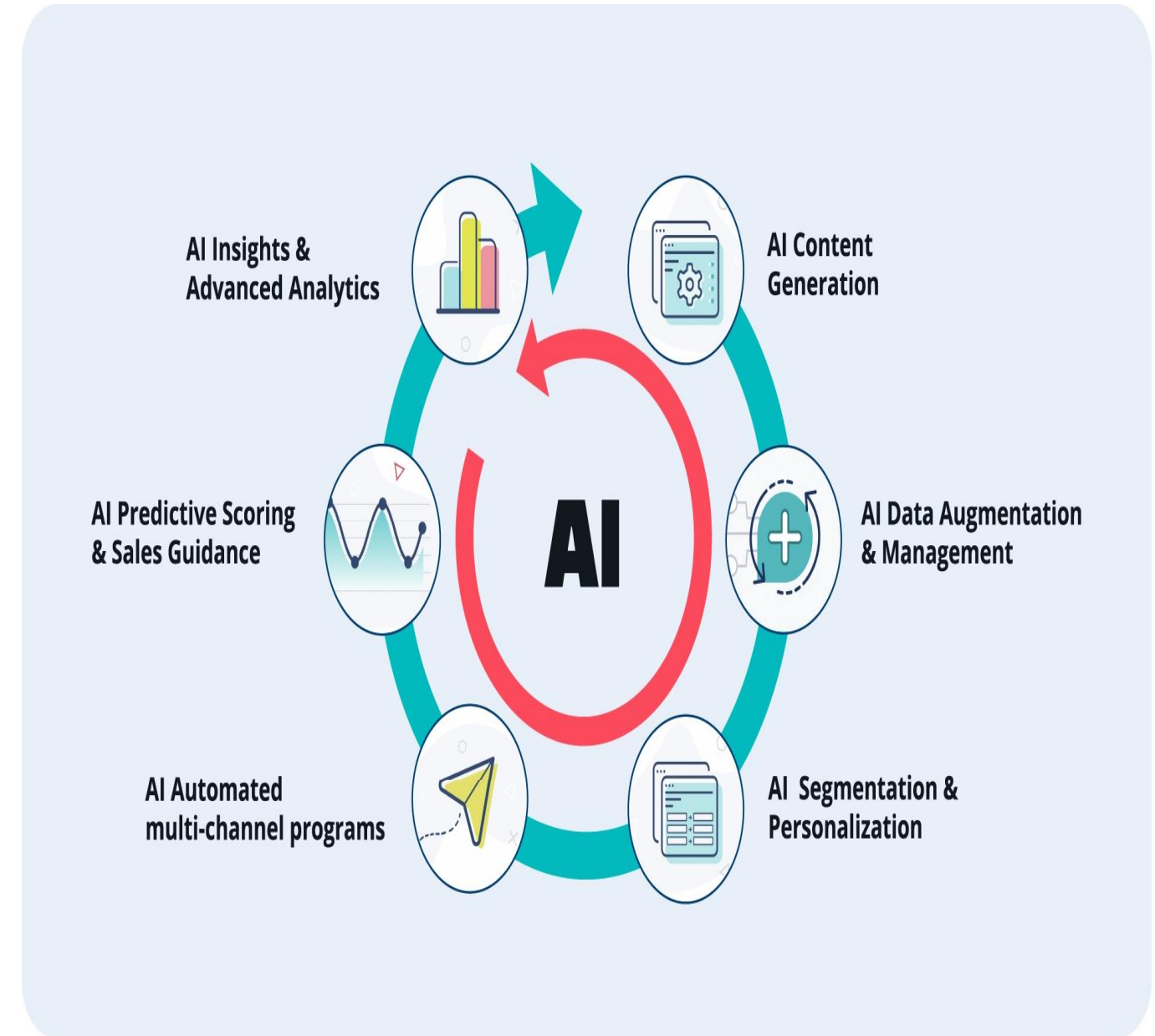
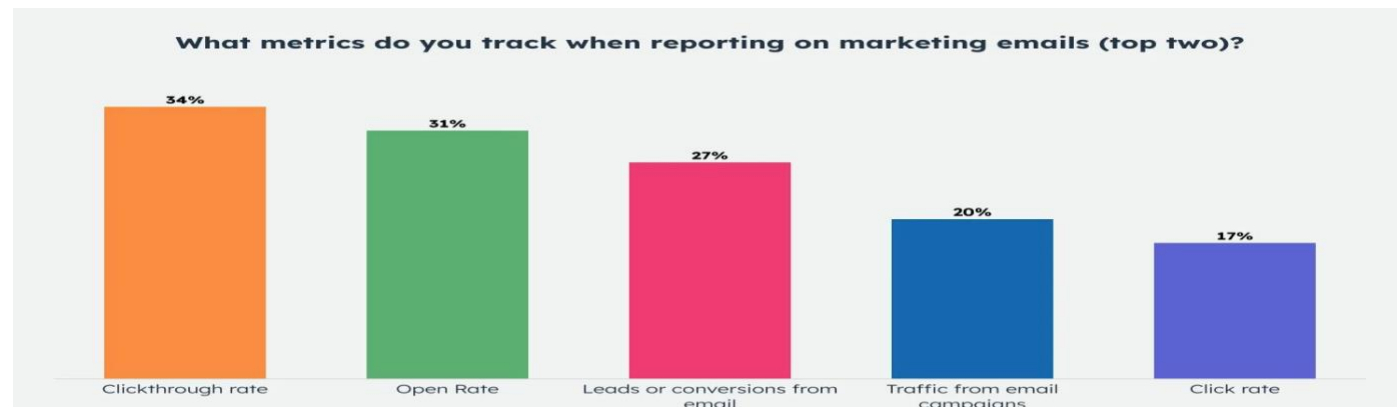
6. LOOK FOR RED FLAGS

Typical red flags to look out for when matching receipts to reports include: the reported purchase does not match the receipt; the requested reimbursement is higher than the amount listed on the receipt; falsifying invoices or receipts and attempting to claim reimbursement for the same purchase multiple times. Refer below for key pointers.

Elevate Email Marketing by AI

An innovative AI-driven email marketing solution designed to revolutionize your organization's outreach strategy. With advanced analytics, personalized content generation, and automated campaign management, EmailAI ensures

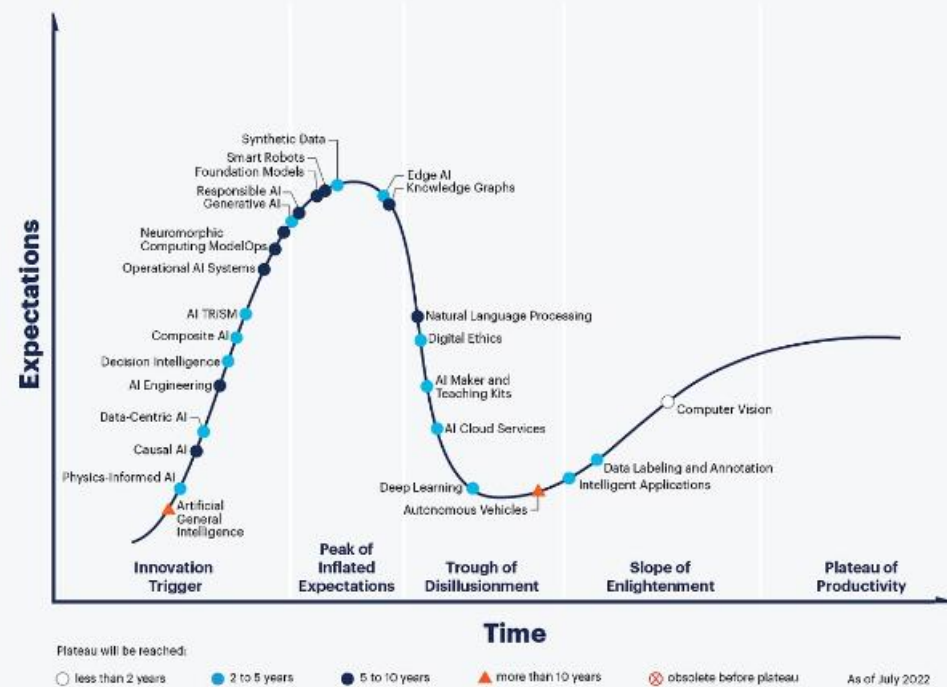
- highly targeted and engaging emails.
- Boost open rates
- enhance customer engagement
- and drive conversions effortlessly with our intelligent, data-driven platform.



Demand Forecasting

Artificial intelligence (AI) is transforming the AMCs industry by enhancing demand forecasting capabilities. AI-powered models can analyze complex data patterns to predict product demand more accurately, helping firms define and refine their offerings.

Hype Cycle for Artificial Intelligence, 2022



gartner.com

Source: Gartner
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Gartner

Internal Data

Historical sales, client demographics, portfolio performance, and other proprietary information.

External Data

Economic indicators, market trends, competitor analysis, and customer sentiment data.

Data Preprocessing

Cleansing, standardizing, and integrating data to prepare it for AI model training.

Feature Engineering

Creating new variables that enhance the predictive power of AI models.

AI Avatars in Asset Management

AI avatars are transforming the way asset management firms interact with clients/Distributors . These intelligent digital assistants can provide personalized product information, recommendations, and support, enhancing the client experience and driving business growth.

Consistent Messaging

AI avatars ensure a unified brand voice and deliver accurate, up-to-date product details across all touchpoints.

24/7 Availability

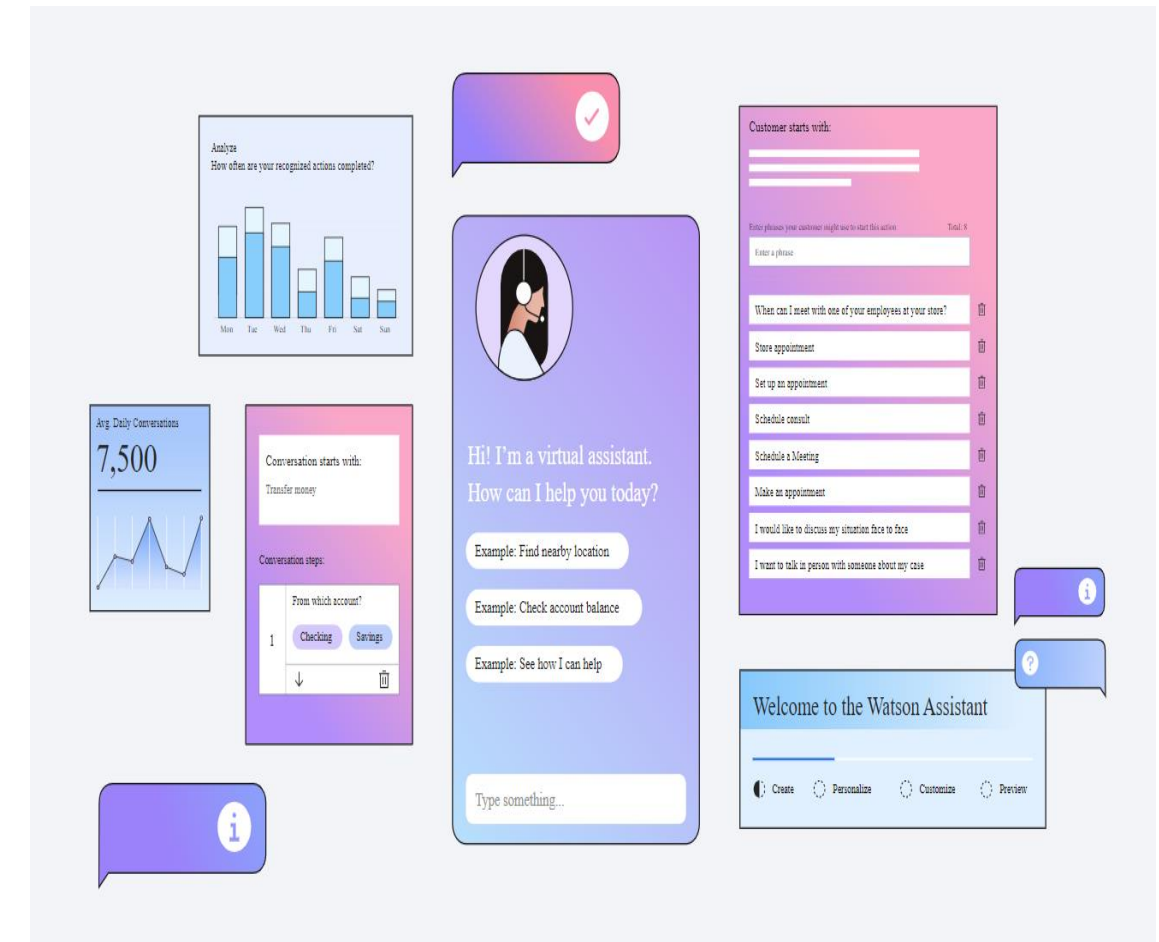
Clients can access product information anytime, without the constraints of human operating hours.

Scalable Support

AI avatars can handle multiple client inquiries simultaneously, improving responsiveness and efficiency.

Continuous Learning

Continuously improve its knowledge and capabilities based on client interactions and feedback.



AI Avatars in Asset Management

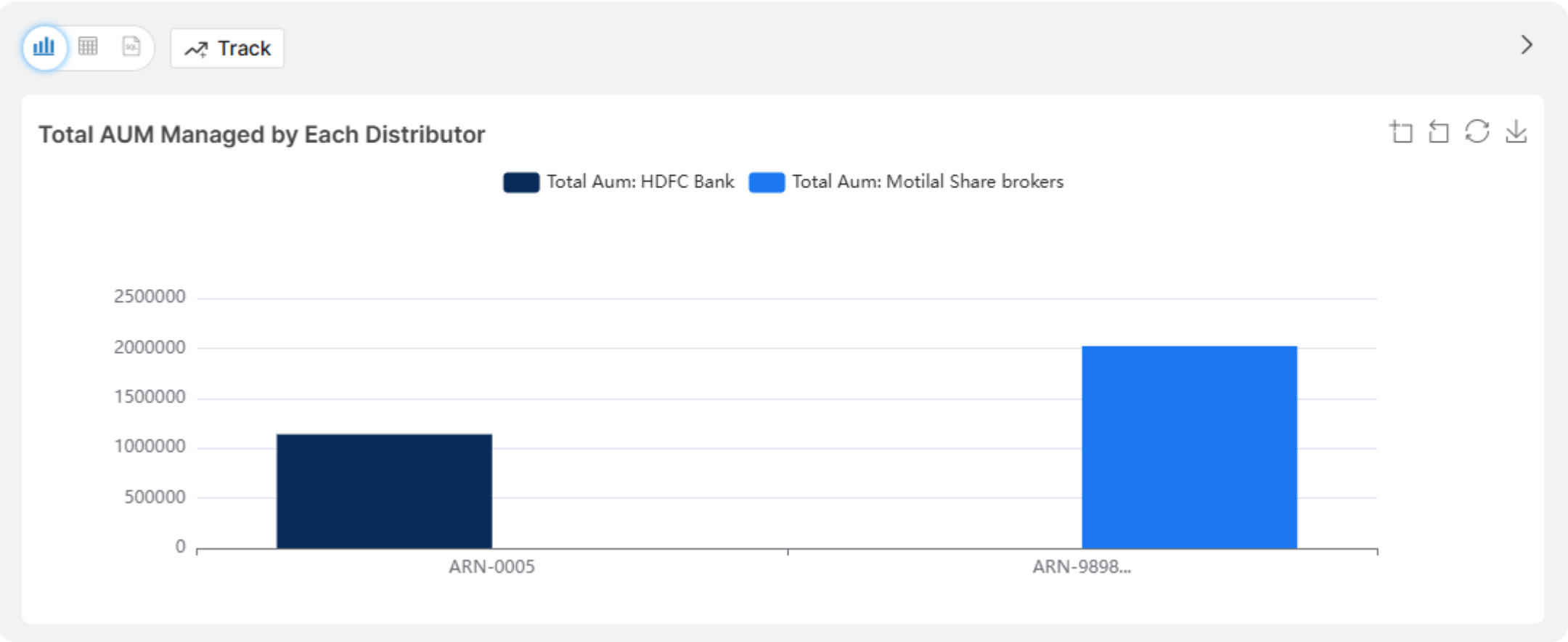
What is the total AUM managed by each distributor?

PG

25 Aug 2024, 12:38 PM (1 day ago)

Here's Your Answer

This report calculates the total Assets Under Management (AUM) managed by each distributor. It joins the 'daily_units_balance' table with the 'scheme_master' table on the 'scheme_no' column and sums the 'fund_size_in_cr' for each distributor. The results are grouped by distributor name and code and ordered by the total AUM in descending order.



Did we get it right?

CYLSYS VoiceBot



Speech Recognition

Accurately interpret and transcribe user voice inputs. This includes recognizing different accents and dialects, ensuring accurate transcription even in noisy environments. It also involves distinguishing between spoken words and background noise.



Text-to-Speech

Provide clear and natural-sounding audio responses. This ensures a seamless and engaging user experience. The VoiceBot can adjust its voice based on the user's preferences, making it more personal and relatable.



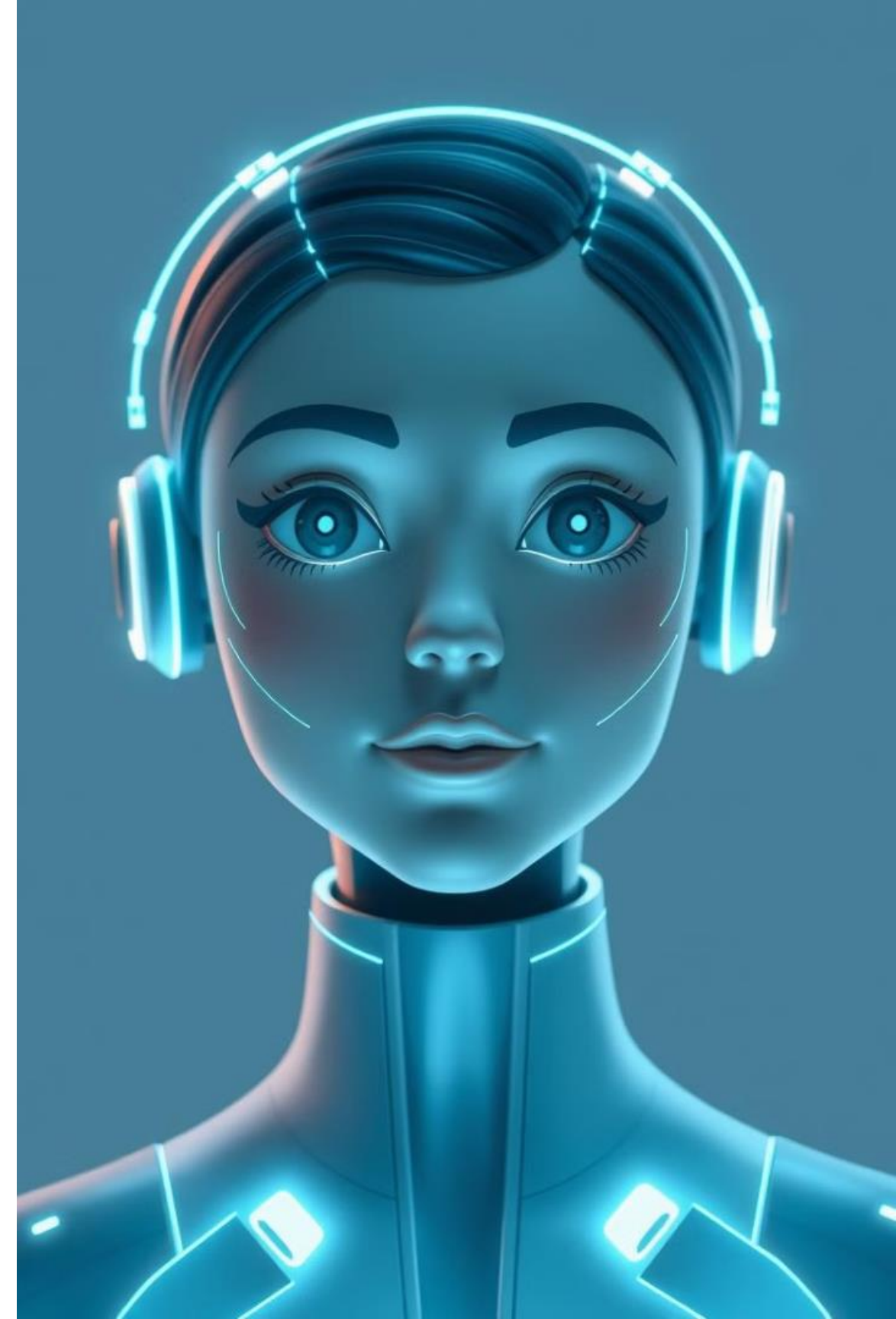
Natural Language Processing

Understand the intent and context behind user queries. This involves analyzing the user's tone, sentiment, and overall context of the conversation. It allows the VoiceBot to provide relevant and personalized responses based on the user's needs.



Analytics and Reporting

Track user interactions and optimize VoiceBot performance. By analyzing user data, CYLSYS VoiceBot can identify patterns and trends, allowing for continuous improvement of its capabilities and response accuracy.





Conclusion: Embracing AI to Drive Sales and Client Satisfaction

By leveraging AI, relationship managers in the asset management industry can enhance their capabilities, anticipate client needs, and deliver personalized solutions that drive sales and foster long-term client relationships. Embracing this transformative technology is key to staying ahead in a rapidly evolving financial landscape.