

RM Assist - Customer Summary Report

Smart Summary

Recommendation Message: Customer Zainab has shown drop trend. Recommended: Offer FX advisory for next AED 10K transfer

Next Best Action: Offer FX advisory for next AED 10K transfer

Engagement Score: 75/100

Pitch for RM: Pitch pending

Customer Profile

Name: Zainab | CIF: CIF0002

Segment: NEO

Employer: Etisalat (Telecom)

Net Worth: AED 60000.0

Balance History: {'Jan': 62000, 'Feb': 60000, 'Mar': 58000}

Campaign History: Credit card offer in Jan; rejected

Products: FX

Recent Transactions

Date	Description	Amount (AED)
2024-07-05	Salary from Etisalat	20000.0
2024-07-01	FX transfer to India	15000.0

RM Info

Relationship Manager: Sana