

RM Assist - Customer Summary Report

Smart Summary

Recommendation Message: Customer Ali 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: Ali | CIF: CIF0001

Segment: GOLD

Employer: DP World (Logistics)

Net Worth: AED 80000.0

Balance History: {'Jan': 102000, 'Feb': 99000, 'Mar': 98000}

Campaign History: FD rate offer in Jan; accepted

Products: FD, 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: Abhishek