

RM Assist - Customer Summary Report

Smart Summary

Recommendation Message: Customer Harish has shown stable trend. Recommended: Introduce investment webinar and advisory

Next Best Action: Introduce investment webinar and advisory

Engagement Score: 75/100

Pitch for RM: Pitch pending

Customer Profile

Name: Harish | CIF: CIF0003

Segment: GOLD

Employer: ADNOC (Energy)

Net Worth: AED 150000.0

Balance History: {'Jan': 100000, 'Feb': 100500, 'Mar': 100000}

Campaign History: Wealth account opened in Jan

Products: INV

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