Create a Core Platform that Democratizes Data Access to All Business Use Cases

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Speaker Bio

Rinesh Patel

Global Head of Financial Services
Snowflake

Rinesh is the Global Industry GTM Lead for financial services and is responsible for developing the financial service value proposition and supporting our customers' transition to cloud. Rinesh joined Snowflake in 2021 from Refinitiv, a London Stock Exchange business and has been in the financial services industry for over 20 years. In his last role, Rinesh was Global Head of Cloud Proposition where he established and led a commercially-minded platform strategy team to build a strategic enterprise data platform in the cloud to deliver new cloud based solutions.

Phil Andriyevsky

Partner / Principal, Wealth and Asset Management, Data & Analytics
EY

Phil leads EY's Asset and Wealth Management Data and Analytics practice. He has over eighteen years of experience with large scale date driven transformation initiatives, including Data Strategy, Data Management, Advanced Analytics, and Enterprise Reporting Initiatives. In addition to the Data and Analytics role, Phil is the lead for EY Wealth and Asset Management product development.

Nikita Ogievetsky

Head of Data and Analytics
Pershing X / BNY Mellon

Nikita manages Data & Analytics Engineering at BNY Mellon, Pershing X. Nikita has over 20 years of experience in financial technology, leading Data and Analytics platforms at major Walls Street companies such as Goldman Sachs, Morgan Stanley, Deutsche Bank and JP Morgan as well as at some recent Big Data startups. Nikita originally started his career in Neutrino Astrophysics before becoming one of the pioneers in the space of Semantic Web and XML, and a founding member of the TopicMaps.org ISO standard, which eventually led him to Wall Street.

SEE WHAT OUR CUSTOMERS ARE DOING

FINANCIAL SERVICES SUCCESS GUIDE

8 Ways Financial Services Organizations Deliver Innovation And Security With The Data Cloud

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Financial Services Use Cases

- Quantitative Research
- Quantitative Trade Analytics
- Underwriting
- **ESG & Sustainable Investing**
- **Customer 360 & Next Best Action**
- Asset Servicing
- Regulatory Reporting
- Financial Crime: Fraud, KYC, and AML

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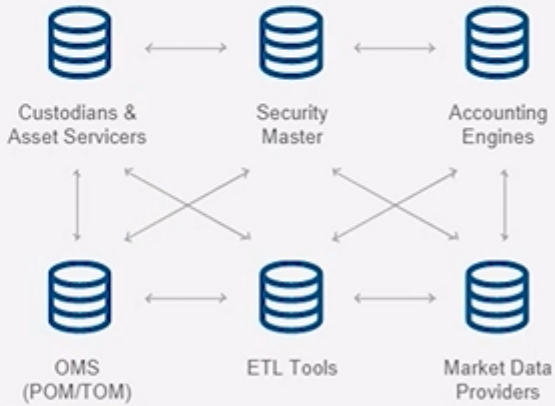
LIVE

Operational Efficiency

Technology and Data Silos
(ex: at an asset manager)



TOMORROW

- Consolidated Platform
- Single Enterprise Data Layer
- Integrated workflow Partners
- Data Sharing
- Data Grid

Which leads to:

- **Reduction in cost & overhead**
- **Improvements in the middle and back office lead to front office alpha and ROC**
- **Winning mandates and AUM**

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Modern Data Platform – Capabilities Model

EY Building a better working world

The below list captures capabilities required for creating a full-featured modern data management platform consistent with industry leading practices across stages of a data pipeline, from data sourcing to the consumption layer. Based on the Data Mesh methodology.

1. Data Sourcing	2. Data Ingestion	3. Data Processing	4. Data Hosting	5. Data Delivery	6. Data Access
1.1 Micro-Batch, Near Real and Real Time Services	2.1 Change Data Capture – Events and Data	3.1 Data Transformation and Integration	4.1 Data Repository Modeling – Data Vaults, Canonical Design	5.1 Data Products – Domain driven published data products	6.1 Data Visualization and Reporting
1.2 Multiple Data Systems and Variety – Events, APIs, Batch	2.2 Schema Evolution – Schema on Read	3.2 Data Standardization and Mastering – Client and Product Master	4.2 Compute and Storage Disintegration – Virtual Warehouses	5.2 Business and Semantic Modeling – Global Data Abstraction	6.2 Advanced Analytics – Visual Data Wrangling, ML
1.3 Structured and Semi / Unstructured	2.3 Workload Prioritization and Security	3.3 Data Derivation, Curation and Data Enrichment	4.3 Storage Containers – Lake, Marts, Warehouse	5.3 Web (Data) Services – Data API Marketplace	6.3 Cognitive Analytics – NLP, AI
7. Actionable Data Governance	7.1 Metadata Harvesting and *Business Taxonomy Integration*	7.3 Business Rule Engine – Profiling, Quality & Transformation Rules	7.5 Process and Data Lineage – Clear Line of Sight	7.7 Data Catalog and Search – Collaboration	7.9 Records and Information Management
	7.2 Information Privacy – Cross Border and Global Data Privacy	7.4 Data Tokenization – Sensitive Data Scrub for Global	7.6 Data Quality – Monitoring, Validation and Curation	7.8 Data and API Marketplace Governance	7.10 Digital Platform Integration Governance

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