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About this presentation

Title	Power your AI transformation with the Microsoft for Financial Services
Summary	As new AI technology grabs headlines and captures imaginations for businesses and consumers alike, capital markets firms have a unique opportunity to harness the power of AI to drive value faster in their own businesses. This deck provides an overview of the differentiated value of the Microsoft Cloud to help capital markets firms and the roles across their organization power their AI transformation, featuring examples from across Microsoft's commercial solution areas.
Primary Audience	Executive BDMs: C-level, EVPs, SVPs
Delivered by	Multiple roles across Commercial Cloud Corporate/Subsidiary Marketing and Sales
Content Level	L100
Deck Owners	Dave Morehouse, Claudia Hauser, Andrew Comas
Usage Guidance	Use this deck to facilitate a customer conversation . Speaker notes are available in the notes section but pause frequently and ask questions. More resources are available at aka.ms/AITransformation , including an FAQ, an abbreviated version of this deck, video guidance, additional demos and conversation decks, and more.
Important note	Attention and interest in the Microsoft AI story is high, which means the stakes are even higher. Please ensure you are adhering to approved messaging and decks, because what may seem like small deviations in messaging can have legal and reputation implications for Microsoft . Avoid discussing confidential or unreleased information about Microsoft or our partners. Please reach out to AI Speaking Requests (AISpeaking@microsoft.com) if you are preparing for a presentation and need additional guidance.
Version	<i>Version 1</i>

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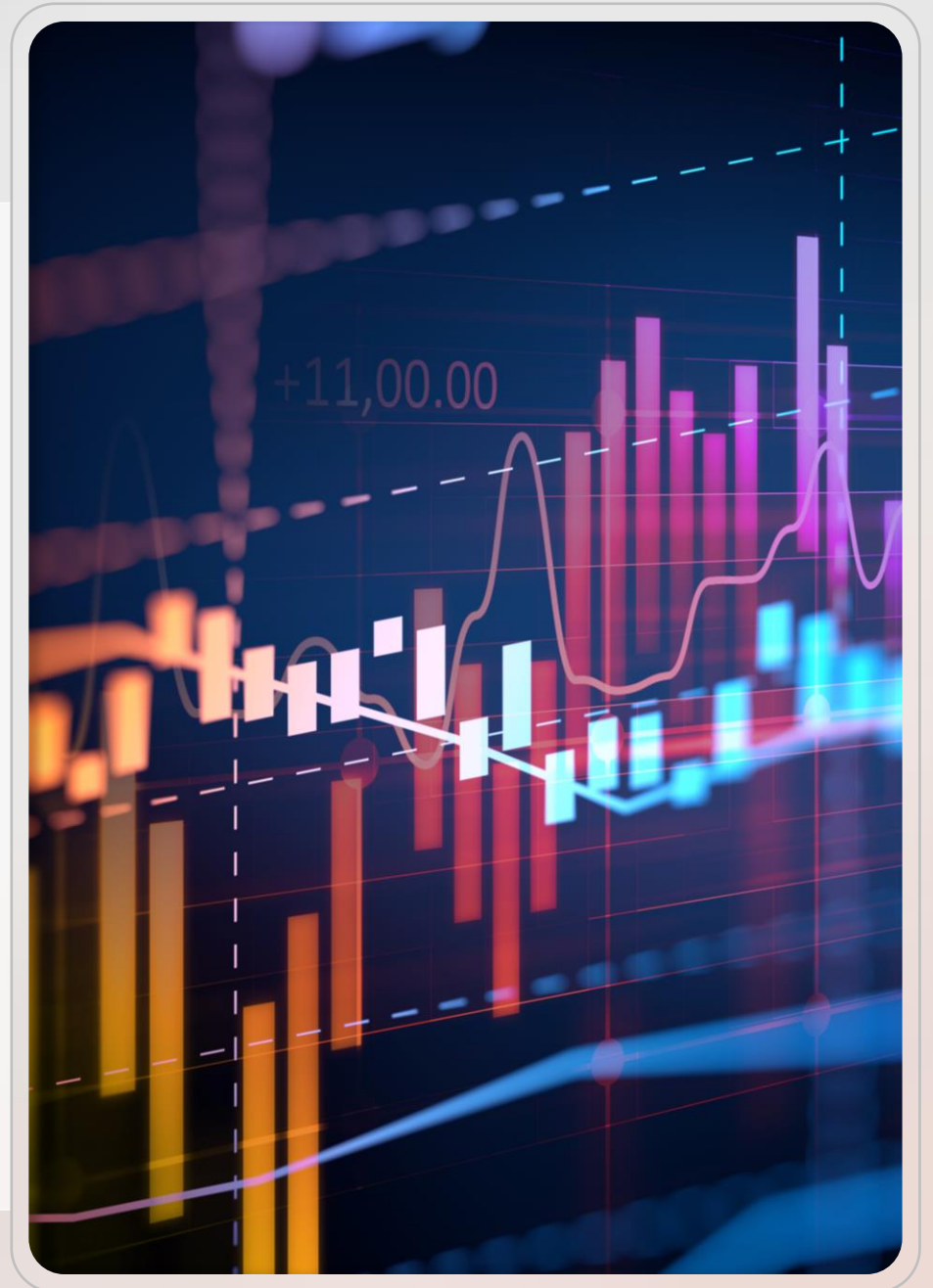
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Top **AI use cases** for capital markets



Enhance market research and analytics



Empower advisory and sales



Personalize and augment the client experience



Improve risk and compliance management



Automate operations



Top AI use cases for capital markets

Enhance market research and analytics



[UBS](#)

Delivering advanced AI and analytics for data-driven insights

Moody's

[Moody's](#)

Empowering financial insights with Moody's research assistant

Empower advisory and sales

HARGREAVES
LANSDOWN

[Hargreaves Lansdown](#)

Driving productivity and enhancing client experiences



[Van Lanschot Kempenn](#)

Streamlining daily tasks, freeing up time for more personal client connections

Personalize and augment the client experience



[Aditya Birla](#)

Empowering growth with engaging and seamless client experiences



[Investec](#)

Yielding high productivity returns with Copilot

Improve risk and compliance management



[UBS](#)

Enhancing risk and compliance with secure financial solutions

Vontobel

[Vontobel](#)

Tripling compute capacity with elastic high-performance computing

Automate operations

BCI

[BCI](#)

Transforming efficiency and collaboration with Copilot



[Old Mutual](#)

Enhancing efficiency and security with AI and cloud technology



Capital Markets Hero AI Use Cases

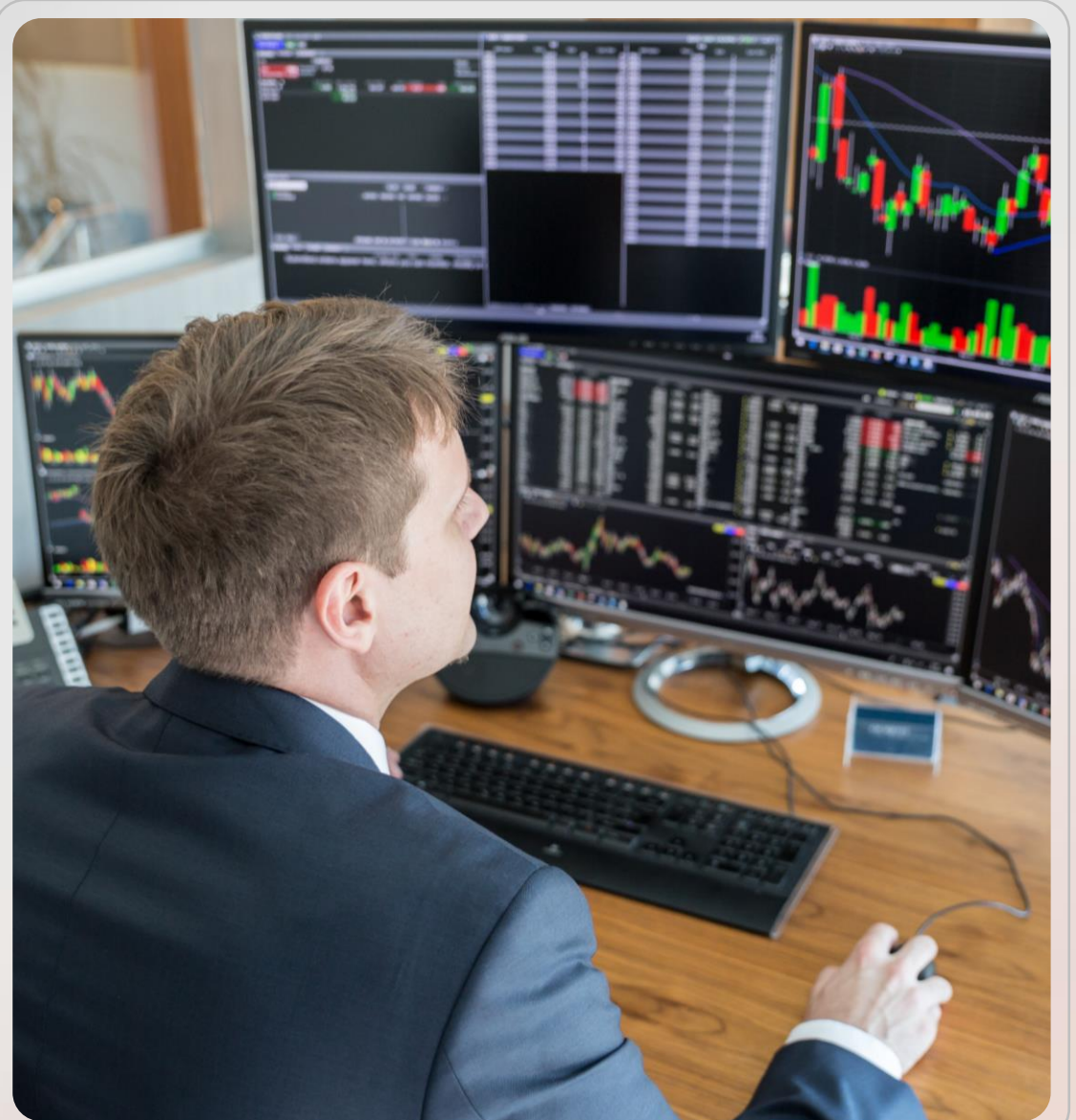
Enhance market research and analytics



Enhance market research and analytics



Deepen market understanding and accelerate decision-making by infusing financial research with AI-driven analysis and summaries of reports, earnings calls, and market sentiment.



Enhance market research and analytics



Extract actionable insights from volumes of data, **enhancing the accuracy and speed of market predictions.**



Enhance investment decision-making by using AI and advanced analytics for **more informed perspectives, reduced risk, and maximized returns.**



Improve operational efficiency and reduce costs through workflow automation and integration of AI agents.



AI in capital markets: Enhance market research and analytics



- **Streamlined content access and provided real-time information** to client advisors, boosting efficiency and client engagement, and saving time in meeting preparation and research.
- Adopted and **rolled out the solution to 30,000 employees** as of December 2024.
- **Accelerated growth and brought innovative ideas** to life with industry-leading AI and cloud services.

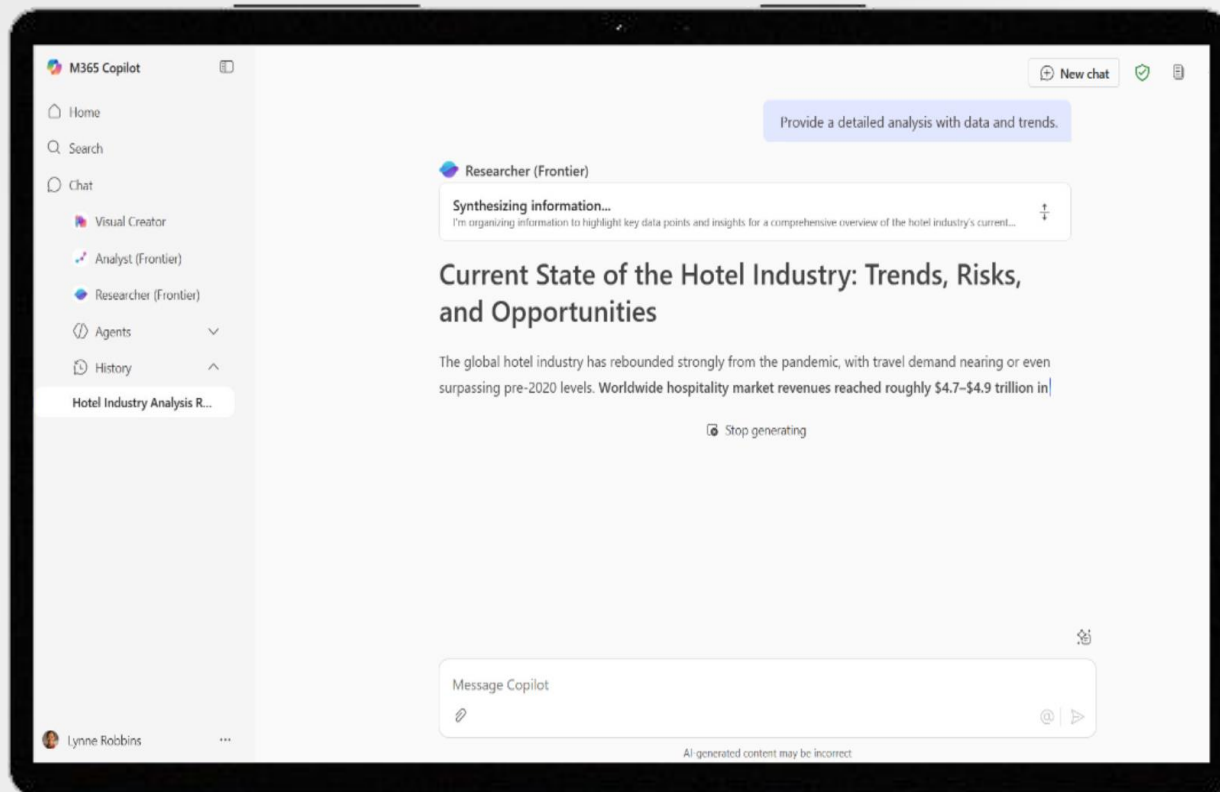
[Read the UBS story >](#)



- Moody's 360 Copilot helps employees and customers **gain productivity** with a first-of-its-kind research and analytical copilot.
- Allowed customers to **generate new insights and save time**.
- **Drove pragmatic AI innovation** to empower the financial services industry.

[Read the Moody's story >](#)

Improve research analyst productivity with Copilot and agents



Accelerate industry research and analysis

Accelerate industry research with AI agents that analyze data, provide insights, and generate recommendations quickly.

Enhance data-driven decision making

Convert raw data into actionable insights and visualizations with advanced analysis tools, enabling informed investment decisions and strategic planning.

Streamline complex workflows

Automate routine tasks and complex workflows with AI agents, saving valuable time and improving efficiency in research, analysis, and reporting.

Improve collaboration and productivity

Use AI-powered solutions to improve team collaboration, provide real-time data access, and support strategic decision-making, boosting productivity and achieving business goals.

[Demo](#)

Next Steps: Accelerate your AI journey

Empower your Employees

Begin your AI journey by equipping teams with M365 Copilot and Copilot Chat

Launch M365 Copilot and Copilot Chat

[Try now](#)

Assess your AI maturity

Run a comprehensive assessment of your AI maturity and benchmark it against peers in your industry

Schedule a Secure AI assessment

[Schedule a conversation](#)

Develop an AI strategy

Develop an AI plan across the five drivers of AI value: business, technology, applied AI experience, org & culture, governance

Schedule an AI Center of Excellence workshop

[Schedule a workshop](#)

Build and test your Agents

Identify repetitive tasks and processes you can automate and develop prototype agents for rapid testing

Explore process mapping and Agent prototyping

[Schedule a workshop](#)



Capital Markets Hero AI Use Cases

Empower advisory and sales



Empower advisory and sales



Boost engagement and revenue by helping advisors and sales professionals prepare for client meetings, generate personalized client presentations, and deepen portfolio and market insights with the help of AI.



Empower advisory and sales



Optimize client meeting prep, conduct, and follow-up with **AI-generated insights and meeting summaries.**



Draft tailored investment proposals that include data from virtually any specialty provider or data source.



Deepen market and portfolio insights and enhance collaboration with product experts and analysts.



AI in capital markets:
Empower
advisory
and sales

**HARGREAVES
LANSDOWN**

- Financial advisors now complete **client documentation four times faster**, improving turnaround and service quality.
- Employees **save an estimated 2 to 3 hours per week** by automating routine tasks like note-taking and drafting communications.
- **Enhanced meeting productivity** with AI-generated action items in Teams reducing manual effort and improve follow-up accuracy.
- **96% of employees** report that Copilot has helped simplify daily tasks, indicating strong adoption and perceived value.

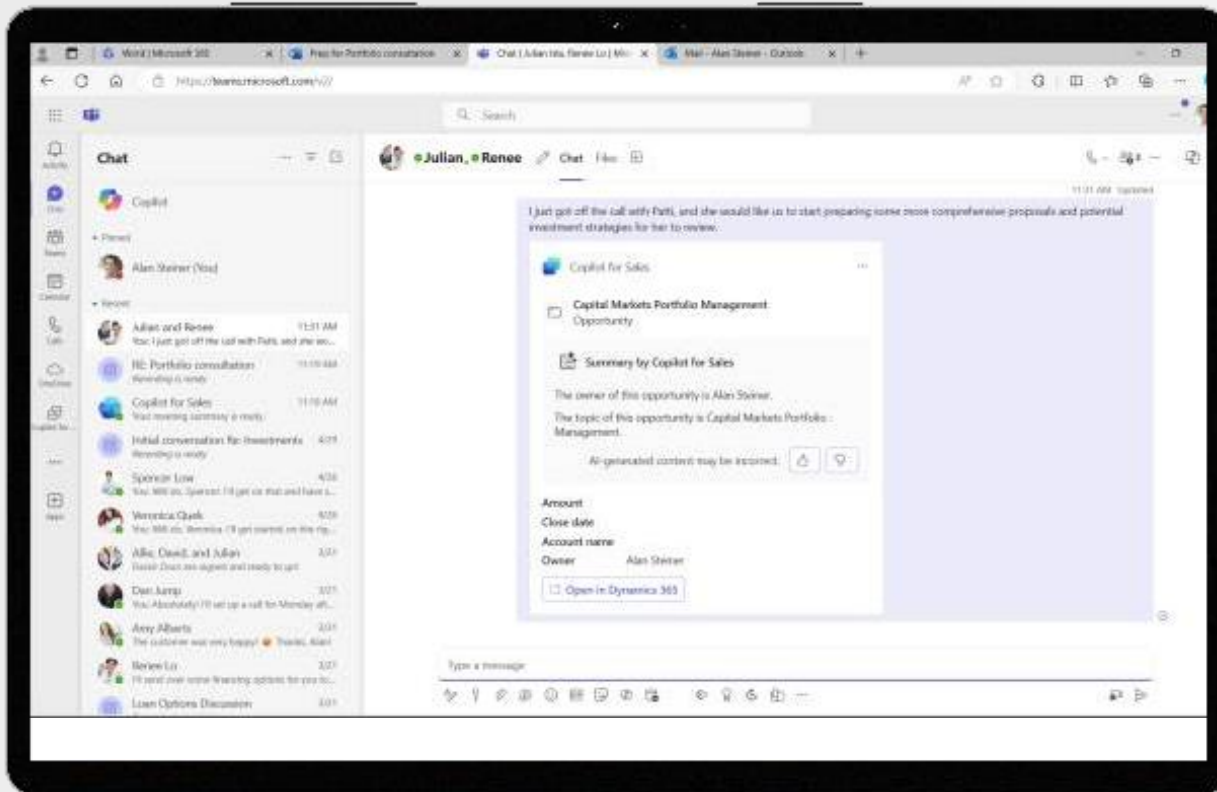
[Read the Hargreaves Lansdown story >](#)



- **Automates** time-consuming administrative work.
- Tasks like note-taking, searching transcripts, and drafting multilingual communications are **streamlined for improving efficiency**.
- **Reduced the time** needed for daily tasks.
- AI assistant for more personal wealth management enables advisors to deliver more tailored financial advice by freeing up time to build **deeper personal connections** and interactions with colleagues **and clients**.

[Read the Van Lanschot Kempen story >](#)

Improve sales advisor productivity with Copilot for Sales and Microsoft 365 Copilot



Organize next steps and action items

Prioritize and respond to communications, summarize recent communications, and generate detailed summaries to help organize and prioritize the day.

Save time on email and CRM

Quickly get up to speed on complex email conversations, generate summaries highlighting key points, and surface relevant client and account data.

Analyze industry trends

Summarize complex reports, compare investment strategies, and gather key information quickly, saving valuable time.

Prepare for client meetings

Generate meeting prep documents from CRM records, files, and market sources, including key participant information, opportunity summaries, and highlights from previous meetings.

Demo

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Capital Markets Hero AI Use Cases

Personalize and augment the client experience



Personalize and augment the client experience



Reinvent client engagement and experience across all channels with AI-powered tools that track interaction history, deliver real-time insights, and unify client information in a single view.



Personalize and augment the client experience



Accelerate onboarding and Know Your Customer (KYC) process for institutional investors and high-net-worth clients.



Reshape client engagement with hyper-personalized interactions, insights, and tailored investment advice.



Provide contextualized client service and new AI-powered client experiences to **increase client retention and reduce churn.**



AI in capital markets:
Personalize
and augment
the client
experience



ADITYA BIRLA GROUP

- **Reduced operating** costs by 40%.
- **Improved employee productivity** in its contact center by 20%.
- **Enhanced client experience** with intelligent AI-powered search within digital platforms to easily navigate financial products and services.
- **Delivered seamless interactions for clients** across mobile, web, branches, and virtual engagement channels.

[Read the Aditya Birla Capital Limited story >](#)



- Integrated conversation intelligence data **saves time on manual entry, reduces overhead, and builds a comprehensive customer view.**
- Automated tools transcribes, records, and logs calls in addition to receiving insights post call such as **identifying positive sentiment and other buying signals.**
- **Adapting their sales practices** to best optimize their tools and use them for training and deeper client insights.

[Read the Investec story >](#)

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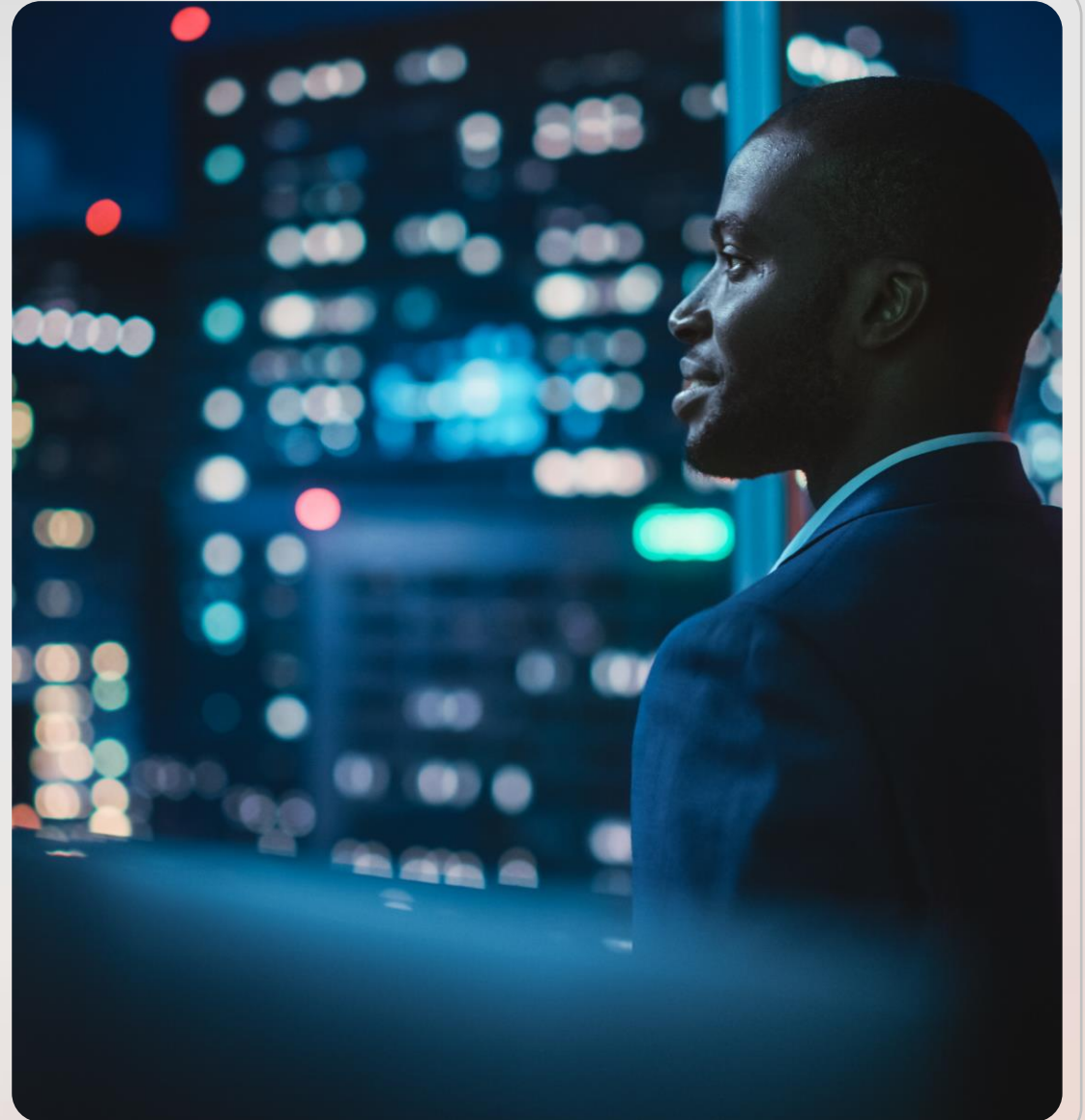
Improve risk and compliance management



Improve risk and compliance management



Enhance the security and integrity of financial systems by using AI to anticipate market and other risks, automate the monitoring of transactions, identify suspicious activities, and ensure adherence to regulatory requirements.



Improve risk and compliance management



Run complex risk simulations and stress tests across various asset classes using AI-powered tools.



Identify potential risks and suspicious activities by using AI to analyze volumes of transaction data and act preemptively to mitigate them and improve resilience.



Optimize compliance with AI-driven dashboards that integrate data from various sources, providing real-time insights and automated reporting.



AI in capital markets: Improve risk and compliance management



- By building and modernizing AI applications on a trusted platform, UBS has **accelerated business growth**.
- Provided agility and insights to its global risk managers for **better and faster risk management and decision-making**.
- Speed vector **store initialization from days to seconds**.
- Provided AI-driven insights while **complying with complex regulatory requirements**.

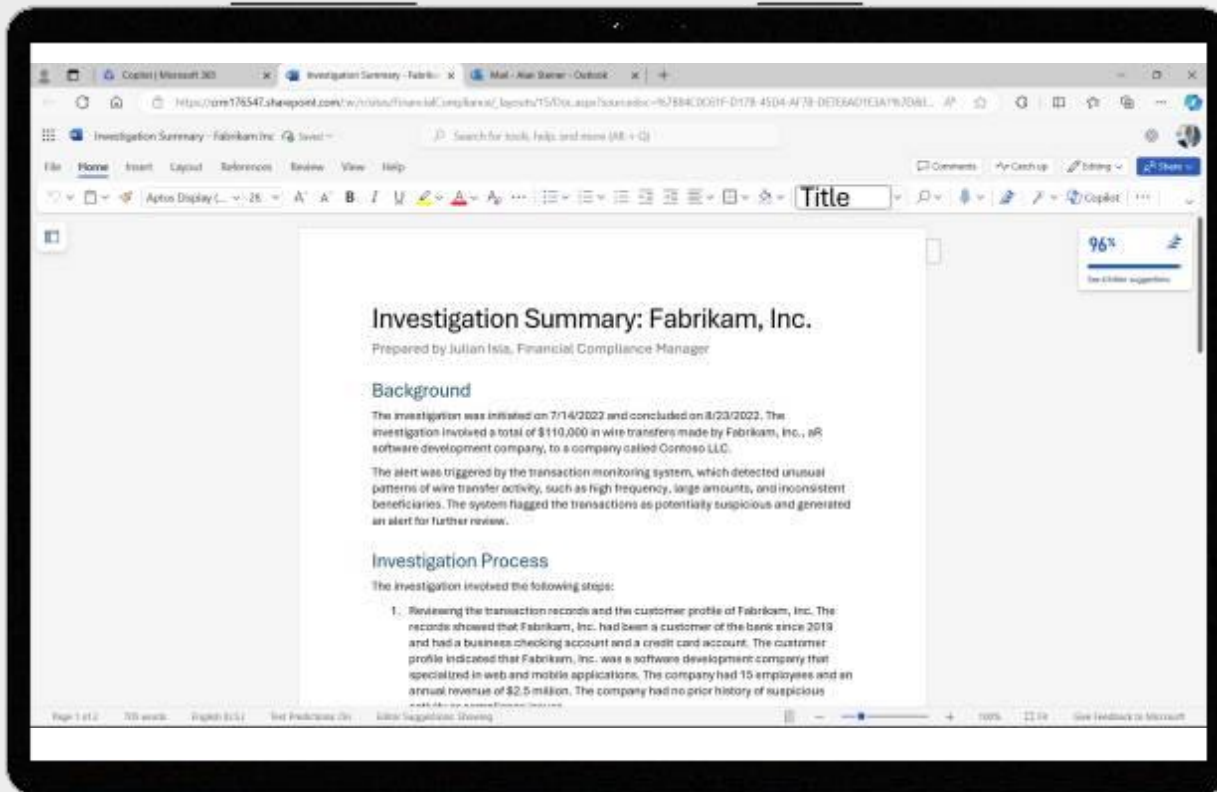
[Read the UBS story >](#)

Vontobel

- **Increased compute load** by roughly a factor of three.
- **Gained reliability, cost savings, and critical elastic flexibility** with Azure deployment.
- Helped developers maximize productivity and **enabled focus on innovation**.

[Read the Vontobel story >](#)

Improve compliance officer productivity with Microsoft 365 Copilot



Organize next steps and action items

Prioritize and respond to communications by summarizing recent emails, messages, and meeting requests, including associated action items and follow-up tasks.

Save time on email

Quickly summarize long email conversations, highlight key points, concerns, and outstanding action items, and create draft emails with suggested meeting times based on availability.

Expedite investigations

Aid in research by summarizing previous investigations, providing links to reference documents, and generating detailed summaries of key points and outcomes.

Quickly generate reports

Draft investigation reports based on key internal documentation, including summaries of current and previous investigations, suggested next steps, and report conclusions.

Demo

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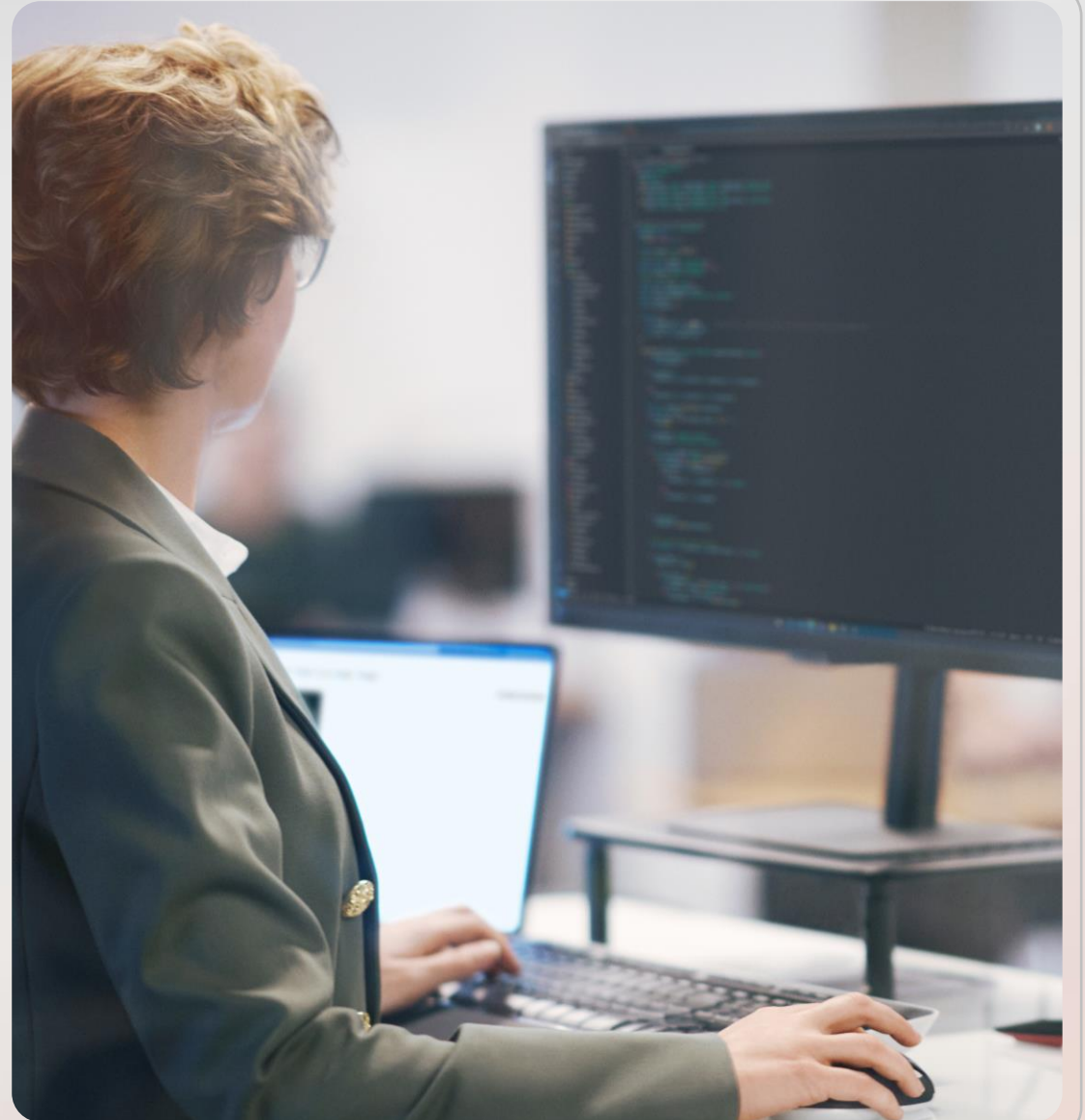
Automate operations



Automate operations



Increase efficiency and reduce costs by using predictive analytics, machine learning and agentic AI to streamline data analysis, reduce manual tasks, and enhance decision-making processes.



Automate operations



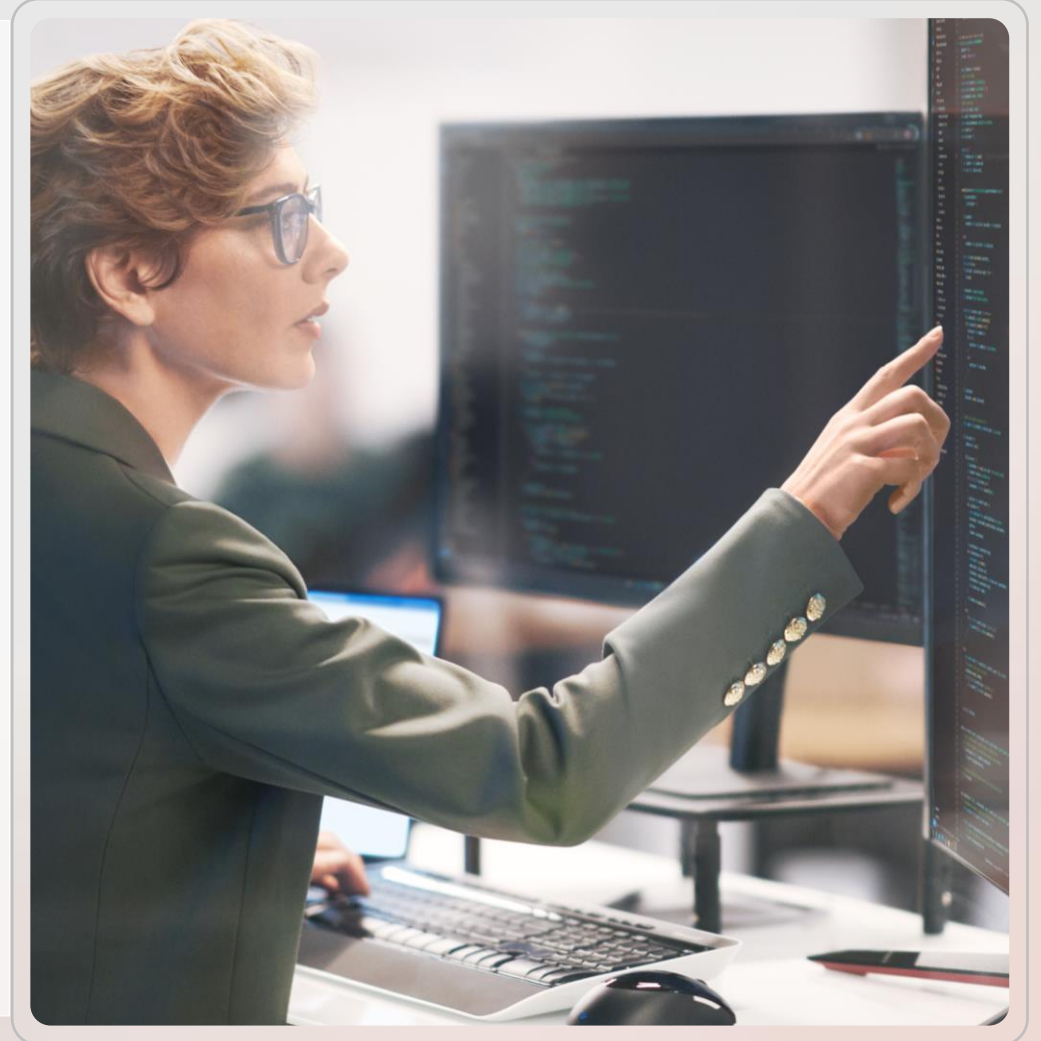
Streamline operations for divisional and organizational efficiency with automation and agentic AI.



Automate client service and support by using no-code and low-code tools to **provide AI assistants and agents that can handle client inquiries and enhance service.**



Optimize back-office operations with AI agents that **automate repetitive and time-consuming tasks** such as document processing and compliance checks.



AI in capital markets: Automate operations



- **Saved more than 2,300 person-hours** with Copilot and AI automation of manual tasks.
- **30% reduction** in internal audit writing time with Copilot.
- Copilot helped analyze 8,000 employee HR survey comments, reducing processing time **by an entire month**.
- **Boosted productivity by 10%–20%** reported by 84% of employees.
- **Increased employee job satisfaction by 68%** through reduced manual workload and more time for strategic high-value activities.

[Read the BCI story >](#)



- **Automated key client transactions**, ensuring frictionless client journeys and improving the overall client experience.
- **Increased efficiency** when handling of client requests and **reduced manual processing**.
- Developed an AI-powered solution to **classify emails by intent and sentiment** that automatically predicted the transactions or services the client was requesting, **enabling faster and more accurate responses to clients**.
- **Increased digital engagement** leveraging AI to nudge clients toward relevant digital channels, enhancing self-service and reducing support load.

[Read the Old Mutual story >](#)

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UBS reimagines financial services for the digital age with data-driven decisions and AI-powered insights

[Read full story here](#)



"While delivering flagship AI solutions like Red is crucial, it's equally important to build a scalable organization that can accelerate the delivery of AI use cases. This involves implementing a data mesh, moving to the Azure cloud, establishing new AI risk governance, and creating AI factories for quicker, more agile solution delivery."

– Jonas Isliker

Head of AI, Data & Analytics of Global Wealth Management, UBS

Business Outcomes



Accelerated excellence:

Enabled faster and more accurate responses to client inquiries through AI "smart assistants"



Empowered decision-making:

Equipped client advisors with instant access to personalized data and market intelligence



Streamlined operations:

Reduced complexity in workflows with Azure AI, boosting efficiency across 5 business divisions



Moody's partners with Microsoft to deliver data-driven next-generation solutions

[Read full story here](#)



"I would say this is one of the most energizing, most interesting, maybe most inspiring moments certainly in my career, I think maybe of our generation."

– **Stephen Tulenko**
President of Moody's Analytics

Business Outcomes



Partnered in innovation:

Co-created new products and services built on Azure OpenAI Service



Empowered employees:

Deployed Moody's 360 Research CoPilot to 14,000 global employees



Improved experiences:

Delivered data to shared customers collaboratively through Microsoft Fabric

Driving productivity and improving client experiences with Copilot for Microsoft 365 and Microsoft Teams Premium

[Read full story here](#)



"Microsoft Copilot for Microsoft 365, coupled with Microsoft Teams Premium, is a chance for us to transform how we work and deliver even better experiences for clients."

– **Vicki Holman**

Collaboration Platform Owner, Hargreaves Lansdown

Business Outcomes



Enhanced productivity:

Employees save on average 2-3 hours weekly with simplified daily tasks



Efficient meeting prep:

Client meeting preparation streamlined, saving employees time and enhancing productivity



Accelerated documentation:

Client documentation completed four times faster by financial advisors



VAN LANSCHOT
KEMPEN

Enabling more personal connection by giving employees a Copilot AI assistant

[Read full story here](#)

[Watch video](#)



"Copilot is the first solution that eases the burden of day-to-day tasks, freeing up time to work on a more personal level but without being yet another complex tool."

– Bas Rapati

Chief Analytics Officer [and Managing Director Digital and Advanced Analytics], Van Lanschot Kempen

Business Outcomes



Reduced cognitive burden:

Automated daily tasks to free up time and energy for more complicated, high value work



More time for customers:

Freed up time to build deeper connections and interactions with colleagues and clients



Accelerated excellence:

Drafted routine correspondence that both sped up and enhanced emails and other documents



ADITYA BIRLA GROUP

Aditya Birla Capital brings down generative AI operating costs with Azure

[Read full story here](#)



"We have built a common platform for generative AI using Azure OpenAI. This platform is being leveraged across all our lines of business, leading to accelerated time to market, higher productivity, and more than 40% in cost reductions."

– Pankaj Gadgil

MD and CEO, Aditya Birla Housing Finance Limited, and Head, Digital Platforms and Payments Strategy, Aditya Birla Capital

Business Outcomes



Enhanced productivity:

Improved contact center agent productivity by 20% through AI-powered tools



Increased efficiency:

Reduced generative AI operating costs by 40% using scalable Azure infrastructure



Unified experiences:

Delivered seamless, omnichannel customer interactions through the SimpliFi chatbot

Delivering a smoother, richer client relationship experience

[Read full story here](#)

[Watch video](#)



"One of the challenges we've faced in the past is not being able to access some of the communications that a colleague may have had with their client. Microsoft Copilot for Sales has enabled us to streamline and pick up right where a colleague left off."

– **Josh Boddington**

Money Market Dealer, Investec

Business Outcomes



Improved decision-making:

Enabled quick, informed decisions with real-time data analytics and insights



Increased efficiency:

Saved approximately 200 hours of savings per year with seamless integration of CRM and Outlook



Enhanced client interactions:

Provided personalized and timely responses with AI-powered email drafts and client summaries

Vontobel

Investment innovator
Vontobel triples
compute capacity
using elastic Azure
high-performance
computing

[Read full story here](#)



"We're now free from the quest for resources, and because our Azure HPC grid is a reliable and truly elastic environment, we've increased our compute load by roughly a factor of three, which is amazing."

– Patrick Kuppinger
Head of the Quant Group, Vontobel

Business Outcomes



Performance at scale:

Increased compute load by roughly a factor of three



Enhanced elasticity:

Gained reliability, cost savings, and critical elastic flexibility with Azure deployment



Improved productivity:

Azure HPC environment helped developers maximize productivity and focus on innovation



BCI empowers employees with Microsoft 365 Copilot, realizing productivity boost

[Read full story here](#)



"At the end of the day, AI is not about technology, it's about people. With technology, we want to give our employees the tools to help them leverage their intellect and creativity, to do more with their day-to-day, and free them up to focus on doing great things."

– Aaron Leskiw

Senior Manager, Digital Workplace, British Columbia Investment Management Corporation

Business Outcomes



Increased productivity:

Employee survey respondents reported a 10%-20% productivity increase



Streamlined operations:

Saved more than 2,300 person-hours with Copilot automation of manual tasks



Improved job satisfaction:

Increased employee job satisfaction of 68% Copilot users



Old Mutual Applied Intelligence team led with technology to achieve the ultimate customer experience

[Read full story here](#)



"We are on a constant journey to ensure our customers experience us in a way that is convenient, purpose led and at the cutting edge of innovation."

– **Tags Moodley**

Chief Customer Experience Director, Old Mutual

Business Outcomes



Accelerated excellence:

Enabled faster and more accurate responses to customer requests



Streamlined operations:

Reduced manual handling of emails and improved efficiency



Strengthened engagement:

Enhanced customer engagement by nudging them towards relevant digital channels

LSEG explores modernizing financial markets platforms with Microsoft Azure, AI, and Microsoft Teams

[Read full story here](#)



"Together with Microsoft, we are empowering our customers by increasing productivity while offering greater efficiency, resilience, and scalability across all workflows, and equipping the industry with the right tools for the next generation of financial professionals."

– **Satvinder Singh**

Group Head of Data & Analytics

Business Outcomes



Modernized infrastructure:

Migrated LSEG's data infrastructure to Azure for next-gen financial services



Enhanced capabilities:

Enabled customers to automate processes and unlock insights with AI-powered analytics



Transformed engagement:

Transformed how clients engage with capital markets using agile, cloud-based tools



BlackRock uses
Azure to strengthen
Aladdin, its
investment
management
platform

[Read full story here](#)



“For us to expand and meet our client demands as a fiduciary, we need a cloud platform that will be fast, resilient, and innovative in the long term. Azure is that platform.”

– [Joseph Chalom](#)
Head of Strategic Ecosystem Partnerships, BlackRock

Business Outcomes



Enhanced capabilities:

Azure helped them better meet client demands to be fast, resilient, and innovative long term



Streamlined operations:

Accelerated delivery of new products and improved operational efficiency



Strengthened scalability:

Enhanced flexibility and scalability to support growth and innovation



UBS unlocks advanced cloud and AI techniques for UBS RiskLab

[Read full story here](#)



"With Microsoft Azure, we are building on the industry's leading cloud platform in terms of innovation, technology, security and regulatory compliance, which is very important as a Swiss financial institution."

– Paul McEwen

Group Head of Technology Services

Business Outcomes



Governed AI platform:

Launched RiskLab AICE—a secure, fully governed generative AI and RAG platform for financial insights



Future-proof compliance:

Built a custom Azure AI framework to meet strict regulatory demands while scaling innovation



Instant data access:

Reduced vector store initialization from days to seconds, accelerating risk decision-making



BNY and Microsoft forge strategic alliance to expand leading capital markets data and analytics platform

[Read full story here](#)



"For 240 years, we have been building new solutions to help our clients grow their businesses, and this is the latest step towards making investing more effective, easier, and less expensive."

– Akash Shah

Chief Growth Officer, BNY

Business Outcomes



Enhanced capabilities:

Provide clients with near real-time, data-driven decision-making tools that can help improve agility



Streamlined development:

Will accelerate the release of BNY's next generation data and analytics cloud-based offering



Increased innovation:

Provide clients with continuous integration and delivery of new features and upgrades

LGT drives digital workplace transformation with Microsoft Copilot

[Read full story here](#)



"Modern work environments lay the foundation for an agile corporate culture and for business success in a digitally connected world. With Microsoft as our partner, we can realize our vision of a forward-looking digital workplace in every way."

– **Peter Matt**

Head of Digital Workplace, LGT

Business Outcomes



Streamlined operations:

Enabled employees to save an average of one hour per week by streamlining daily tasks



Empowered decision-making:

Fostered a modern, flexible, and secure digital workplace that supports seamless collaboration



Enhanced productivity:

Simplified communication and data exchange through integrated Microsoft 365 tools

PIMCO

PIMCO boosts client service with AI-powered search platform built on Azure AI

[Read full story here](#)



"We loved the completeness of vision Microsoft has shown with AI, including security and compliance. Azure AI has allowed us to spend time building solutions instead of building AI plumbing."

– [Sanket Bafna](#)

Senior Vice President, Head, Client Data Intelligence and Sales Technology, PIMCO

Business Outcomes



Boosted client experience:

Delivered faster, more accurate responses to client inquiries through the AI-powered platform



Enhanced productivity:

Freed up valuable time for client-facing teams by reducing manual data searches



Improved data confidence:

Increased trust and transparency by providing verifiable sources for AI-generated responses

Sanabil Investments boosts productivity by adopting AI at work through Microsoft 365 Copilot

[Read full story here](#)



“With Microsoft 365 Copilot streamlining writing and editing processes, we observed the impact on employee’s productivity, and now focus on work quality, rather than fetching information or checking grammar.”

– **Megren Alshaiq**

Head of IT Solutions, Sanabil Investments

Business Outcomes



Accelerated productivity:

Reduced time spent on routine tasks like email drafting and presentation creation



Empowered collaboration:

Improved meeting productivity by automating note-taking, allowing participants to engage more actively



Enhanced innovation:

Integrated AI into daily workflows, helping teams make faster, more data-informed decisions



eFront Copilot
unlocks new
efficiencies for
platform users

[Read full story here](#)



“Increasingly, our clients need to be able to integrate and customize the tools that they are using to get direct access to data, to be able to access an entire integrated ecosystem of partners and vendors.”

– [Randy Fradin](#)

Managing Director and Tech Fellow, Aladdin Engineering

Business Outcomes



Accelerated excellence:

Enabled faster access to private market insights by transforming prompts into real-time analytics



Streamlined intelligence:

Eliminated the need for manual data configuration and navigation across dashboards



Empowered decision-making:

Delivered usable, AI-powered knowledge that supports more informed and strategic investment

Pictet Group one of the leading Swiss private banks adopts FinanceGPT based on Microsoft Azure Open AI by Swiss-based Unique AG

[Read full story here](#)



"Together with Unique, we've introduced One.Chat, a Generative AI platform that allows fast and tailored access to vast amounts of internal information and data for all our employees. This has already allowed us to reduce administrative work, speed up existing processes, improve IT support..."

– **Steve Blanchet**

Head of Group Technology Strategy & Innovation at Pictet Group

Business Outcomes



Accelerated excellence:

Enabled over 5,000 employees to quickly access internal data and regulatory info through One.Chat



Streamlined operations:

Automated documentation, email composition, and client conversation summaries



Strengthened compliance:

Ensured secure and regulation-aligned AI usage by hosting all data in Swiss datacenters



Franklin Templeton is working with Microsoft to build an advanced financial AI platform

[Read full story here](#)



"Bringing together the financial services and technology expertise and shared vision of our teams, Franklin Templeton's financial AI platform ushers in a new realm of capabilities for the industry, helping drive the personalization that today's clients expect."

– **Bill Borden**

Corporate Vice President, Worldwide Financial Services for Microsoft

Business Outcomes



Empowered internal teams:

Delivered more personalized client support by embedding AI into daily workflows



Increased productivity:

Streamlined internal processes, improved efficiency at scale via composable business apps



Enhanced client engagement:

Enabled more intuitive, contextual experiences by merging structured data with real-time insights



Mo is designed to surface and summarize Morningstar's independent insights in a conversational format for investors and investment professionals

[Read full story here](#)



"AI has huge potential to support a better investor experience at scale, and this is just the beginning. Mo is a digital research assistant that uses the power of the Morningstar Intelligence Engine to put Morningstar's research just a question away."

— James Rhodes

Morningstar's chief technology officer and president of Data, Research, and Enterprise Solutions

Business Outcomes



Empowered decision making:

Delivered instant access to Morningstar's investment research, helping users navigate over 750,000 investment options



Simplified research:

Replaced keyword searches with natural language queries, enabling faster, more intuitive discovery of relevant financial insights



Enhanced user experience:

Empowered investors with a digital research assistant that summarizes complex data into actionable responses in seconds



New artificial intelligence powered capabilities help governance teams and corporate secretaries realize time and cost savings

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"Our collaboration with Microsoft allows us to unlock greater business insights, accelerate innovation and optimize operational excellence for our clients."

– Jeff Thomas

Executive Vice President of Nasdaq's Corporate Platforms business

Business Outcomes



Increased productivity:

Enabled board members to quickly access key insights by automated summarization of reports, agendas, and presentations



Optimized governance:

Reduced time and cost for governance teams by streamlining manual boardroom processes with intelligent automation



Informed decision-making:

Equipped directors with timely, data-driven insights to navigate increasing boardroom responsibilities