



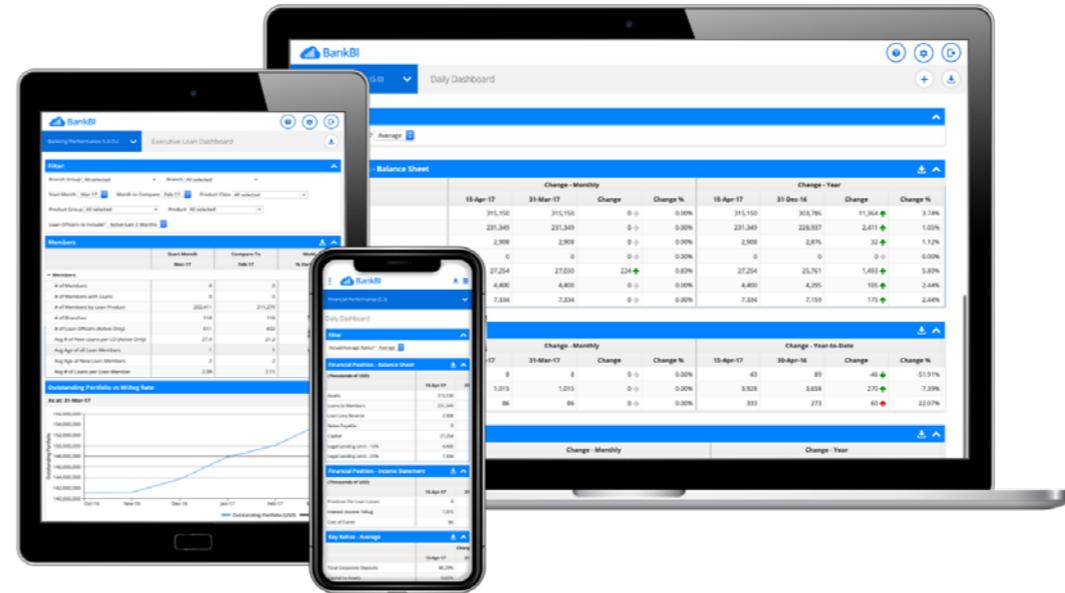
Factsheet — Fusion Phoenix

Cloud-based, out-of-the-box Financial Performance as a Service

Pre-integrated with Fusion Phoenix, BankBI equips the C-Suite and senior managers at financial institutions to manage the growth of their balance sheet, increase efficiency by measuring productivity, and monitor profitability on a daily basis.

General ledger and core banking systems fail to report the insights an institution needs to understand its performance in critical areas. As a result, many senior managers lack actionable insights and have to make reactive decisions based on historic performance data. Many firms also rely on manual, spreadsheet-based processes that are prone to error and deliver out-of-date information.

Delivered via a software-as-a-service subscription model on Microsoft Azure cloud, BankBI is a fast-to-implement, cost-effective and powerful solution for managers at financial firms looking for better performance management.



Key features

- SaaS delivery: easy-to-implement, scalable and cloud-native.
- Out-of-the-box industry KPIs, dashboards, and metrics.
- Available on any device, anytime, anywhere.
- No development or report-building required.
- Works with all main industry core banking systems and general ledgers.
- Low-cost operating expenditure with no upfront investment required.
- Configurable and fully automated management and board reporting.

How it works

BankBI extracts data from any core banking system or general ledger every day with no need for a data warehouse, enabling users to make data-driven decisions based on daily metrics. It is a role-based application that automates the delivery of metrics and reporting for CEOs, CFOs, COO and CLOs.

Available on PCs and mobile devices, BankBI provides a full set of dashboards, KPIs and metrics plus monthly management reporting out-of-the-box, with no development or report-building required.

Performance information in BankBI starts at **Executive Summary** level, with key metrics against strategy, and then drills down into **Financial Analysis**, showing the drivers of performance and allowing for future-facing modelling and what-if calculations.

Daily Product Analytics provide a comprehensive overview of everything managers need to know about performance related to people, product, channel and branch. Risk, compliance and audit teams can be supported with data inputs to the ALCO committee, reconciliation, proof for regulatory reporting and management reporting figures.

BankBI outputs include:

- Consolidated and branch level reporting.
- A range of configurable scorecard metrics, for example by branch or loan officer.
- Performance against budgets report.
- Fully automated Board Pack reports.
- Averages and weighted average rates reporting, for example debt expenses analysis, costs, yields & margins.

Sample actionable insights from BankBI:

- Monthly or daily balance sheet position for assets, loans, total deposits, minimum cash position, and their changes from the previous day, month, or year to date.
- Growth in loan portfolio against a weighted average rate of the portfolio.
- Key indicators related to customers, deposits, average rates, portfolio growth fluctuations and rate trends against the average rate.
- Regulatory net worth to assets, capital conservation buffers, level of capitalization.
- Forecasting of lost interest income, preparation for the potential of negative rates, and proactive management of the loan and deposit portfolio.

[Get in touch](#)

About Finastra

Finastra is building an open platform that accelerates collaboration and innovation in financial services, creating better experiences for people, businesses and communities. Supported by the broadest and deepest portfolio of financial services software, Finastra delivers this vitally important technology to financial institutions of all sizes across the globe, including 90 of the world's top100 banks. Our open architecture approach brings together a number of partners and innovators. Together we are leading the way in which applications are written, deployed and consumed in financial services to evolve with the changing needs of customers. Learn more at finastra.com

Finastra and the Finastra 'ribbon' mark are trademarks of the Finastra group companies.

© 2020 Finastra. All rights reserved.

Corporate Headquarters

4 Kingdom Street
Paddington
London W2 6BD
United Kingdom
T: +44 20 3320 5000

