

## Factsheet – Risk Advisory Platform

# A cloud-based advisory solution that monitors positions, grows revenue and improves productivity

The Risk Advisory Platform app is a cloud-based digital advisory solution for corporate holdings. It enables relationship bankers to monitor real-time position valuation, risk, simulations and product suggestions, increasing revenue through improved front office productivity.

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*First the platform enables us to reach customer segments with more complex needs. Hence customer engagement increased and sophisticated high value solutions were offered. Secondly offering the use of this risk platform underlined our digital competence towards our customers enticing them to expand their custom."*

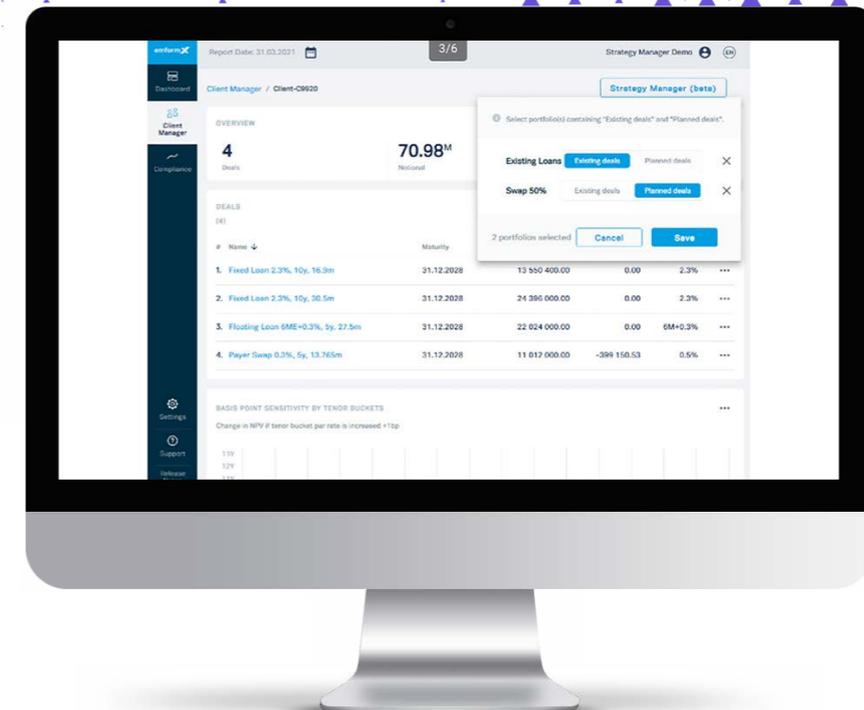
Despite digital transformation trends, corporate bankers are struggling to grow opportunities due to manual processes. Slow face-to-face advisory is leading to client attrition. Bank information is often scattered across spreadsheets and systems.

Customer services expectations are changing. Mid-market corporates are expecting tailored services across all their bank positions. Clients expect a digital interaction, leveraging real-

time analytical aspects and offering data integration. Client's needs are driven by increasing amount of data available. The importance of combining banking services, market and client data creates additional synergies available beyond face-to-face relationships.

Risk Advisory Platform is a cloud-based digital advisory solution for corporate holdings that monitors real-time position suggestions.

Leading Tier One German Bank



Client Manager section shown above

## How it works

Traditional physical coverage models can't deliver the up-sell results banks expect in a competitive environment. This raises the importance of data. Banks are facing many challenges such as simplifying clients' banking tasks online, keeping up with business and market changes, as well as benefiting from fulfilled banking needs.

Risk Advisory Platform by emformX bridges the physical to digital client coverage. Corporate bankers can finally achieve clients' goals faster and change the way products are matched with client demand, anytime data, markets or client preferences change. The solution's multi-bank product visibility, decision support and market pulse are wrapped up over a cloud. This enables corporate banks to possess actionable information before competitors, delivering high-end product ideas faster, at a fraction of the cost and while engaging clients into strategic digital interaction. Transparency driven instrument valuation and simulation capabilities are available across all client positions.

The solution offers immediate cloud service availability to comply with changing clients' expectations. It assists in new advisory efforts with easy navigation through various analytical views and reports. This helps better understand past and future risks related to products, within real or sample client use case context. It is combined with pre-integrated independent broker data and simplified interpretation of results via pre-generated reports and visualizations. In addition, automated notifications ensure sales teams do not miss action items, insights or a new deal opportunity.

Risk Advisory Platform is available as Software as a Service (SaaS) on Microsoft Azure cloud foundation. Multi-tenant or cloud options are available, and the solution can also be connected to the bank's existing systems. The app is pre-integrated with Finastra's Fusion Summit to allow easy integration of loan, foreign exchange and hedges data with analytical outputs into banks' portal solutions.

## Why Risk Advisory Platform?



Centralize loans, cash, currency exposure, currency and interest rate hedges data for remote coverage.



Track sales teams' KPIs pointing to a loan, currency and interest rate hedges optimization or to a new deal opportunity.



Deliver up-sell ideas online or via digital channels, powered by the solution's engine and broker data.



Shared access enables companies to re-use bank data and perform relevant treasury tasks, anytime business or markets change.



Pre-integrated with Finastra's Fusion Summit to allow easy integration.

# 100x+

*utilization of data  
in understanding  
and simulating  
client situation.*

## Key benefits



### Enhance productivity

Centralize loans, cash, currency exposure, currency and interest rate hedges data for remote coverage. Banks can operate with more data and leads simultaneously, resulting in 10 times lower client case preparation time and an increase in the number of clients covered per headcount.



### Shared platform

Transactions, product intelligence, broker data and bank interaction capabilities are united over cloud to help businesses simplify daily banking and create up-sell opportunities. Shared access enables companies to re-use bank data and perform relevant treasury tasks, anytime business or markets change. .



### Increase revenue

Higher client coverage frequency and better data visibility leads to faster product opportunities. Aligning clients around a new cloud service reduces churn and creates services barriers against challengers.



### Reduce cost

Data driven interaction reduces the need and effort to visit corporate clients in person and save money on travelling. The solution also lowers costs when underlying digital banking business scales. Additional service plug-in option allows scaling with limited investment.



### Simplify integration

The app is pre-integrated with Finastra's Fusion Summit to allow easy integration of loan, foreign exchange and hedges data with analytical outputs into banks' portal solutions.

## Contact us

### 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](https://finastra.com)

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