



# Leveraging AI and Innovation for Enhanced Client Outcomes

# Our Vision



“ We continue to maintain **focus on our clients’ needs**, targeting **highest quality standards** for our investments... ”

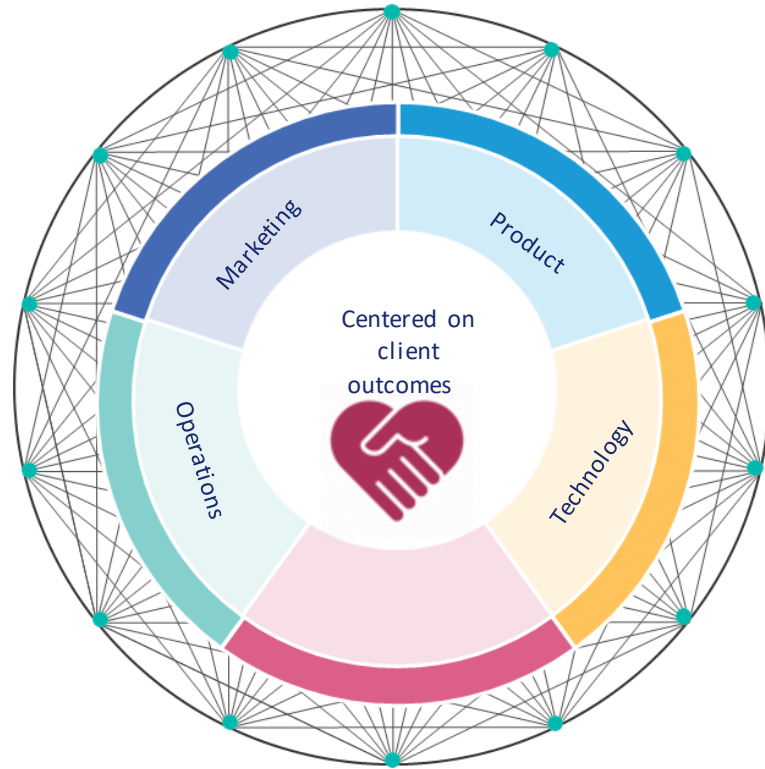
It is a process that allows us to:

Focusing on our clients' needs, monitoring the product quality and client investment behaviours

Becoming a solutions provider for product creation

Building trust through communicating product drivers and active positioning in a user-friendly manner

# Cross functional team



# Harnessing data...

from **cross functional**  
departments...

...representing **clients'**  
**experiences** overall...

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It ensures that data can be measured and connected and  
in a single client centered platform



# MedDataHub



Scalable data ingestion  
+ processing capabilities



Utilising best-in-class  
cloud technologies



Modelled data and  
data quality engine





# Enhancing client outcomes

Understanding our clients,  
the model and the context

Ensuring the team are  
cross functional in nature

Having the right data  
structure

Addition of Artificial Intelligence into the  
process to

1. add insights and
2. suggested actions

3. MedBRAT
4. Client Centricity LOGOS



...**staying in sync** along the client  
experience journey

# Prediction of flows

## Predicting Fund Flows

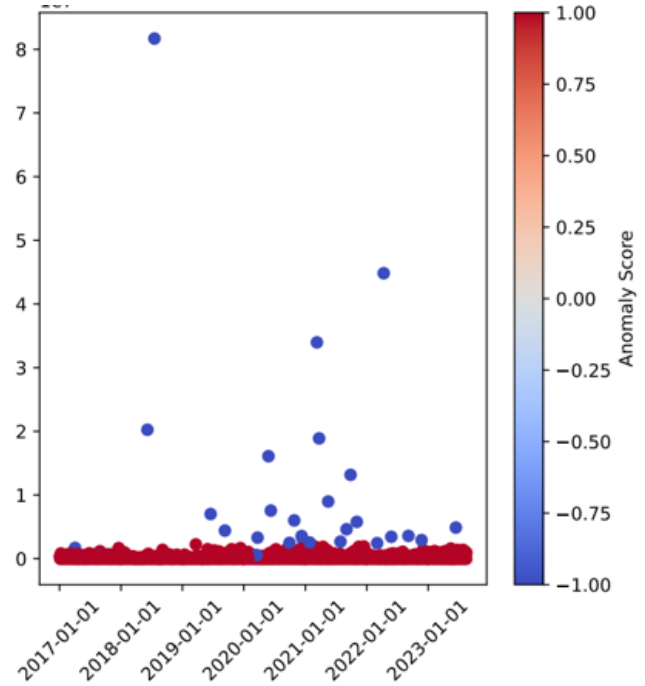
- Analysing historical data and patterns.

## Anomaly Detection

- Identifying Irregular inflows / outflows
- Early Intervention with clients

## Result:

- Client Engagement
- Timely Action







# 45.79bn!

AUM last Month: 46.12bn (-0.72%)  
05 October 2023

# 1.23bn!

Net Sales Vs L Year: 1.76bn  
(-29.86%)

# 53%

Retail Investors %

# 28.81%

Pct in 4th Quartile (Net 1Y)

Last Months %: 33.3% ↓

# 58

Subfunds

# 22

Green

# 31

Amber

# 5

Red

Fund

All

Umbrella

All

Asset Class

All

Choose RAG METRIC

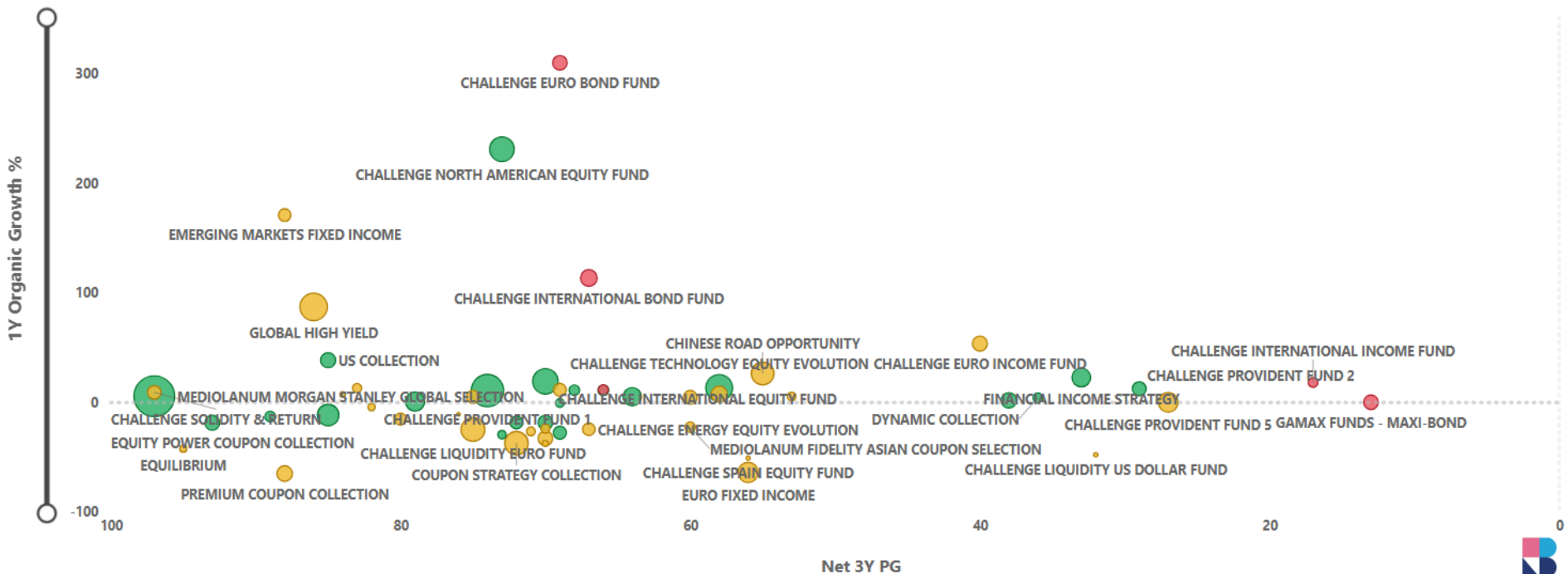
Performance RAG

X-Axis

Net 3Y PG

Y Axis

1Y Organic Growth %



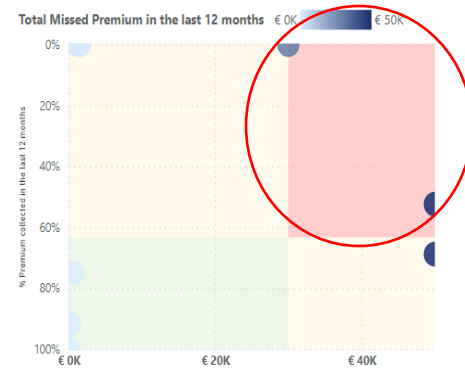
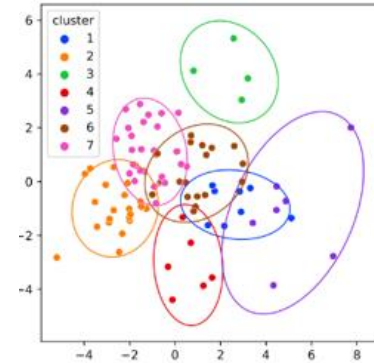
# Client Experience – analyse the sentiment

- Building a client sentiment set from their behaviours to date that allows us to direct financial advisors, leading to tailored services and products that meet their unique needs.
- Automated Natural Language Processing / Topic Analysis on queries to flag operational issues that warrant immediate attention and action
- Continuous Monitoring of Query Sentiment for Ongoing Enhancement and improvement of client experience .

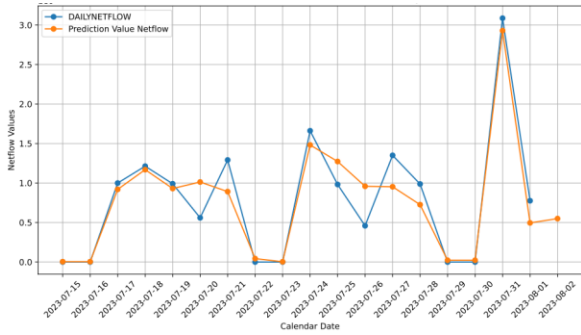


# Client Clustering

- Identifying similar client clusters into distinct segments based on shared characteristics or behaviours.
- Allowing for more in-depth analysis to identify disparities in performance within those cohorts.
- Investigate whether certain clients within a given cohort outperform others.
- allows us to direct financial advisors, leading to tailored services and products that meet their unique needs.



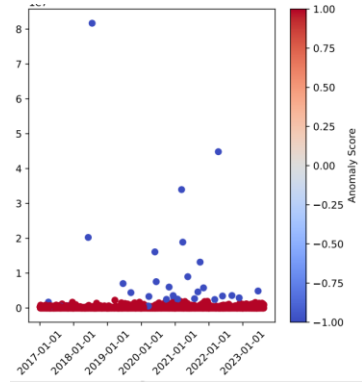
# AI Use Cases



Flows - Sales  
Prediction



Query Sentiment  
analysis

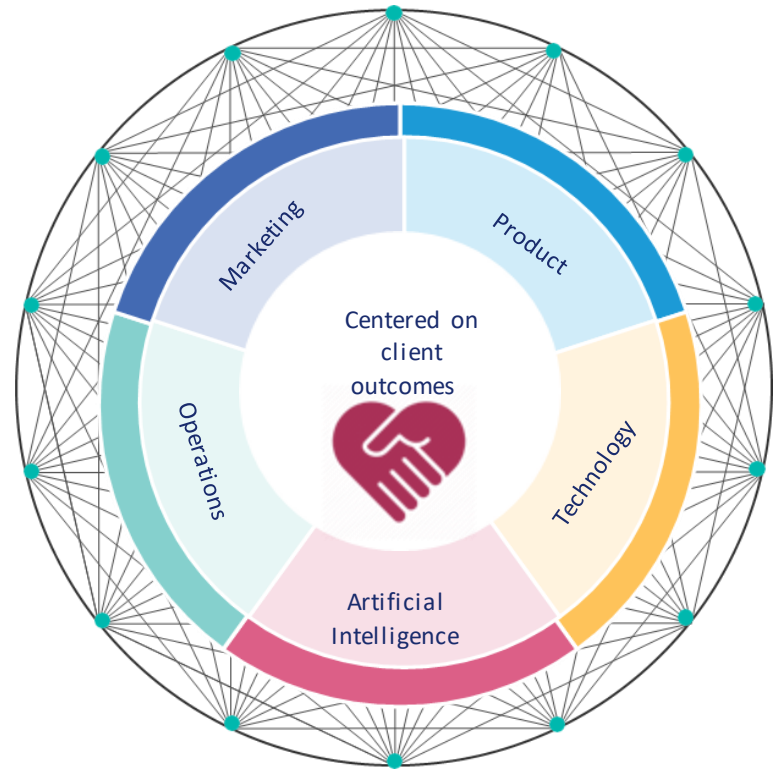


Irregular inflow /  
outflow detection



# Cross functional team

...**constant innovation** to better understand the client experience



**Thank you**

