www.sarwahtech.com

Sarwah technologies

AI-Powered Solutions To Transform Your Advisory Business

WHAT CUSTOMERS SEEK?

1 SUPPORT MULTIPLE BUSINESS MODELS

As Wealth Managers, Independent Advisors, and Private Banks put their digitization strategies into action, several new models for advisory businesses are beginning to emerge. The challenge lies in the ability to build such capabilities in a way that still enables agility in delivering client value, while delivering on cost efficiency at the same time.

2 EXPERIENCE THE BEST OF ‘BOTH’ WORLDS

Incorporating financial advisors and leveraging AI models are not mutually exclusive. Investors seek the advantages of both realms - a hybrid advisory model.

3 SERVE MULTIPLE CUSTOMER SEGMENTS

Customer segments are never static and upgrade/downgrade in segmentation is one of the key aspects in wealth continuum. With this upgrade, the way the advisor serve and interact with the customer must be contextual and aligned.

4 WIDE ASSET COVERAGE

Hyper personalization and support for wide variety of the investment products must be at the core of the offering to serve the customer better.

5 ACCESS TO DIY TOOLS

Investors are looking for more and more DIY tools. These tools should enable them to

- Self onboard/profile
- Invest
- Track
- Provide insights
- Engage digitally

OUR PLATFORM

100+ User Journies	**75+** Microservices	**175+** API's	**1500+** End Points

DIGITAL PRODUCTS

Digital CRM+CLM
Digital Planning
Digital Shopping
Digital Sales
Digital Engagement

ROLE BASED CONSOLES

Advisor Console
Investor Console
OPS Console
Compliance Console
Admin Console

MODERN TECHNOLOGY

Microservices
Omni Channel
Investment Warehouse
Predictive Analytics
Cloud Ready
Fintech Colloboration

INTEGRATED INTELLIGENT INTUITIVE

OUR DIGITAL PRODUCTS FOR WEALTH LIFE CYCLE

Our AI-powered wealth management platform equips financial advisors with cutting-edge tools and technologies to engage clients on multiple digital channels, fostering stronger connections and deeper engagement.

1

DIGITAL CRM+CLM

From onboard to offboard – manage end-to-end customer relations digitally without any deviation from the regulatory rules.

2

DIGITAL PLANNING

Build personalized proposals for varied customer needs, risk profiles and ensure the plans are tracked and adjusted based on customer and market dimensions.

3

DIGITAL SHOPPING

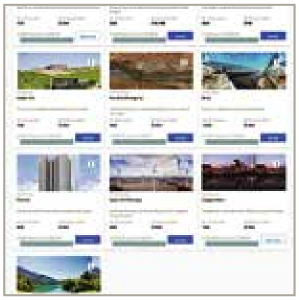
Offer a wide variety of investment products with an ecommerce like experience using our Finmart. Assist the investor/advisor with product related content and analytics.

4

DIGITAL ENGAGEMENT

Win trust & build long lasting client relations with personalized engagement using tools and personalized content from engagement.

S3 DIGITAL APPS

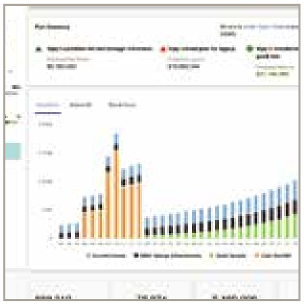


PRIVATE MARKETS

Investors are looking for more and more avenues for investing. The ability to support investing in off-market products like PEF, Derivatives, and OTC products is critical.

C360

C360 has been a very loosely defined functionality since ages. It should not be confined to customer data within the enterprise boundaries. It should cover all the data avenues for the customer data.



GOAL PLANNING

Ability to prioritize, recommend and predict the needs is an important element of planning. The ability to simulate and digitally publish the proposal is the key.

PREDICTIVE ANALYTICS

Understanding and predicting customer behavior to provide personalized services is a must. Spending time on selling right product to the right customer is the key.

WHY US?

LOWER TCO

Through our API-based, cloud-native and flexible licensing approach the TCO of the solution is nominal.

DEEP EXPERTISE

We carry rich implementation and consulting expertise. We leverage this to create win-win relationships.

AGILE TEAMS

Our team is equipped with strong techno-functional skills that adapts MVP based Approach.

MODERN TECH STACK

We track tech trends very closely and deploy best of breed tech-stack for our customers.

ROI VALIDATION

We prioritize measuring the Return On Investment (ROI) of each implementation on a periodic basis, guaranteeing that goals are not only set but also achieved.

SECURE AND SCALABLE

Security and scalability are the essential elements of a digital offering. These two key principles are at the core of our platform architecture.

OUR DIFFERENTIATORS

FINTECH COLLOBORATION
- Open Banking
- Reference Data
- Portfolio News
- Sentiment Analysis

ESG BASED INVESTING
- ESG Profiling
- ESG Model Portfolio
- ESG Analytics

PREDICTIVE ANALYTICS
- AI/ML Models
- Star Schema
- Insights/Nudges

DIGITAL ENGAGEMENT
- Colloboration Tools
- Content Creation
- Content Tagging
- Content Sharing

BEHAVIORAL FINANCE
- Portfolio Review
- Asset Allocation
- Profiling

READY CONNECTORS
- Major Core Banks
- Bloomberg
- Govt. Database
- CRM Systems

ADVANCED DIGITAL TOOLS FOR

Wealth Managers

Independent Advisors

Family Office

Private Banks

Sarwah technologies

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