

Analytics for Wealth Management

Flyer



Empowering Advisors to Drive Financial Growth with Data

In wealth management, gaining a competitive edge can often lie in transforming data into decisive action. Hexaware's analytics for wealth management solution integrates client, account, and portfolio insights, empowering advisors to craft personalized strategies, optimize performance, and stay ahead of market trends. Embrace a unified, data-driven approach that enhances customer experiences and drives sustainable financial growth.

Analytics Solutions for Wealth Management

Interactive, Real-time Dashboards

- Access centralized dashboards for a unified view of portfolio performance.
- Customize performance metrics and KPIs for informed decision-making.
- Generate dynamic reports for portfolios, clients, and accounts.
- Visualize performance across multiple asset classes, including equity, mutual funds, ETFs, fixed income, and alternatives.

On-demand Reporting Tools

- Create detailed performance reports using intuitive querying tools.
- Monitor portfolio trends, risks, and opportunities in real time.

Scalable Data Models

- Simplify data ingestion and validation with pre-built, adaptable data models.
- Integrate third-party data sources to improve decision quality.

AI-powered Insights

- Leverage advanced AI models to deliver real-time, actionable insights from vast datasets.
- Enable personalized investment strategies aligned with individual client goals and market conditions.

Unified Data Governance

- Centralize client, advisor, and account data under a single management framework.
- Support seamless integration across platforms for consistent reporting.

Regulatory Compliance

- Ensure regulatory compliance through automated, standardized reporting.
- Minimize risks with robust compliance checks and streamlined processes.

Key Benefits

Quantifiable Outcomes

80%+
reduction in manual data
processing time

90%+
accuracy in data
extraction and analysis

40%+
decrease in
operational costs

70%+
faster
decision-making

Qualitative Outcomes



Operational Efficiency:

Simplify adoption with scalable and adaptable solutions for banks, broker-dealers, and registered investment advisors.



Personalized Client Advice:

Equip advisors with tools to deliver tailored investment strategies.



Enhanced Trust:

Deliver insights-backed, proactive advice that builds customer loyalty.

Microsoft Suite of Enablers for Wealth Management Analytics

MS Fabric

MS Power BI

MS Azure Purview

MS Copilot

Why Choose Hexaware?



Pre-defined Data Models and Dashboards:

Speed up data ingestion and validation with ready-to-use frameworks and real-time insights.



Modular, Open Architecture:

Customize and scale to meet evolving enterprise needs.



Robust Product Partner Ecosystem:

Leverage industry-leading platforms/solutions through our partner network.



Transform your wealth management strategy with Hexaware's analytics solutions. Empower your teams. Impress your clients. Drive growth.

Scan the QR code and learn more about our wealth management solutions, or contact us at marketing@hexaware.com

About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

Learn more about Hexaware at www.hexaware.com

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