



Financial Services

Automate insight generation from unstructured sources

fractal 
INTELLIGENCE FOR IMAGINATION

The Big Picture

Asset management companies are perpetually in the race to capture mind-share from financial advisors by being relevant, contextual, and timely to drive product sales and adoption. A large portion of advisor interest remains locked in unstructured documents such as analyst reports, home office recommendations, sales notes, and other documents.

A leading global asset management company needed to enable a scaled, automated solution that could extract meaningful insights from vast volumes of unstructured text, and provide a timely, digestible format for consumption by relationship managers.

Transformative Solution

The solution was to apply advanced text-mining algorithms to extract topics and sentiments from volumes of PDF documents, married with industry-specific text libraries, to parse out business-ready content. The solution was then engineered as an HTML application that could be queried in real time and consumed by relationship managers, in this case, by an automatically generated PDF report that was refreshed and published quarterly.

The Change

The solution enabled a 98% improvement in productivity for a relationship manager to identify critical insights from published documents.