Coalition Greenwich

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Meet Your Robot Broker: Al in Institutional Finance

March 7, 2017 Executive Summary:

AI AND ROBOTIC PROCESS
AUTOMATION PROMISE TO
PROVIDE SOLUTIONS FOR
INVESTMENT BANKS IN
TODAY'S ENVIRONMENT
OF CONTINUED COST
PRESSURES AND LOW
MARGINS

BY LEVERAGING AI,
BROKERS COULD EXPAND
COVERAGE TO ALL

4,000
PUBLICALLY TRADED
COMPANIES WITHOUT
INCREASING HEADCOUNT

Artificial Intelligence (AI) is no longer the stuff of science fiction. It is so widespread, in fact, we have likely all interacted with an AI-enabled service this week.

In everyday applications, digital assistants like Alexa and Siri leverage Al to interpret your questions and find the right answer. Online services like customer-support chat and Google Translate leverage vast quantities of data to help you find solutions to complex problems, and the shopping predictions from online websites continually learn from your clicks and searches to present you with appropriate shopping ideas.

Artificial intelligence is also now being utilized in finance, with applications related to fraud detection, credit scoring and robo-advising. To date, most of these are focused on retail rather than institutional applications, but this is rapidly changing with innovations spanning across research, sales, trading, and compliance being developed.

Coalition Greenwich

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Our suite of analytics and insights encompass all key performance metrics and drivers: market share, revenue performance, client relationship share and quality, operational excellence, return on equity, behavioral drivers, and industry evolution.

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