

**FROM LEGACY
TO EXCELLENCE:**
HOW eMACH-SIGMA
REVOLUTIONISED
REPORTING AT A LEADING
WEALTH MANAGEMENT FIRM



India's largest public lender wanted to capitalise on this significant shift in market behaviour by embarking on a digital wealth management transformation journey.

The wealth management industry in India is undergoing a significant transformation driven by a blend of various factors like advancements in technology that are revolutionising the way financial services are delivered, shifting demographics that are influencing market dynamics, increasing urbanity among investors, etc.

India's largest public lender wanted to capitalise on this significant shift in market behaviour by embarking on a digital wealth management transformation journey.

The Bank sought a reliable partner who could help them with an innovative digital solution that abides by their commitment to deepening customer satisfaction while modernising for the future promptly.

Identifying the Right Catalyst



The Bank chose to collaborate with Intellect Design Arena, a global leader in the financial technology industry with rich techno-functional expertise

The Bank chose to collaborate with Intellect Design Arena, a global leader in the financial technology industry with rich techno-functional expertise, providing cutting-edge financial technology products that enable financial institutions to meet their ambition of becoming the principal service provider to their customers.

Intellect's Wealth Qube®, an award-winning cloud-native, API-first, obsolescence-proof platform and eMACH-Sigma, an Enterprise Data platform; proved to be a right fit for this digital transformation journey.



Leveraging Future Ready Systems

Intellects' Wealth Qube®, a streamlined front-to-back solution modelled around the relationship managers' tasks, promised to empower them to deliver higher productivity at lower costs. It also provided smart tools to enhance the quality of advisory enabling wealth and private banking businesses to innovate and scale quickly.

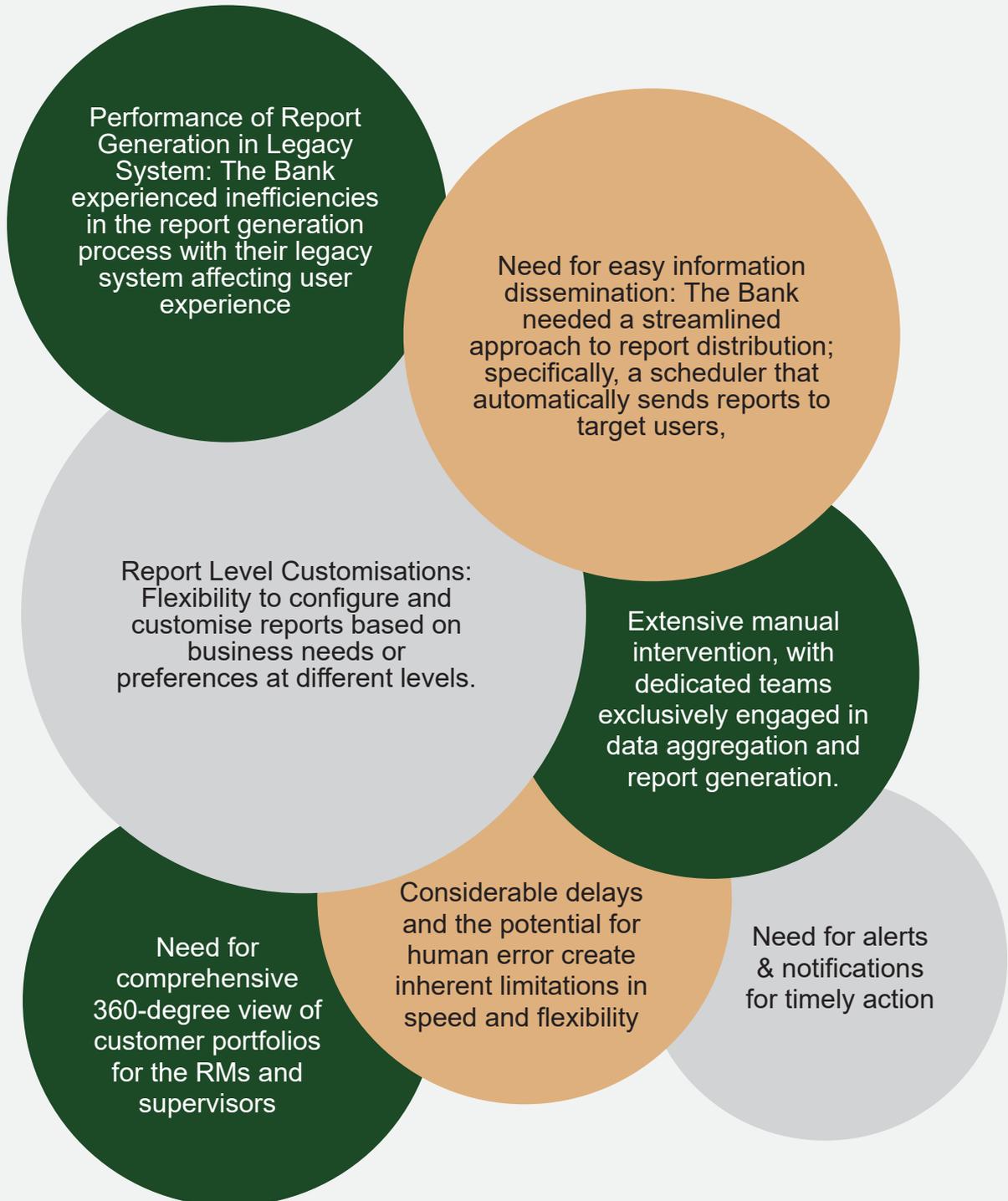
Meanwhile, the Bank also required high efficiency, accuracy, and comprehensive coverage in reporting which included multi-dimensional report generation, user-friendly interfaces, and minimal response time for data retrieval.

Intellect's eMACH-Sigma (an Enterprise Data Platform), with its robust data integration capabilities and comprehensive suite of features, emerged as a beacon of innovation in addressing these multifaceted challenges faced by the Bank, thereby providing a technology-enabled seamless reporting experience.

Now, let us dive deep into the different challenges faced in the reporting journey by various stakeholders in the bank and how eMACH-Sigma elevated the experience of addressing the problems.

Intellect's eMACH-Sigma (an Enterprise Data Platform), with its robust data integration capabilities and comprehensive suite of features

Key Challenges faced in Reporting



eMACH-Sigma transforming Wealth Reporting

Intellect's eMACH-Sigma was selected as the right solution for addressing the above challenges. More than 89 unique wealth management reports were configured & delivered as per the Banks' requirement. This bundle includes specialised reporting modules for Mutual Funds, Portfolio Management Services, Bonds, Corporate Fixed Deposits, and Alternative Investment Funds.

This included data-heavy reports such as AUM Trend Analysis and customer analytics which brings in more than 40 dimensions of information from customers' historical data and investments.

Transforming Operations:

Historically, the operations and business teams depended on humongous manual data compilation and aggregation from various sources for reporting purposes. This not only impacted the turnaround time of creating a report, but also deteriorated their accuracy. eMACH-Sigma with its intuitive drag-and-drop DIY report design interface and flexible data integration capabilities, made creation and configuration of complex reports simpler, efficient consumption by the teams.

Empowering the Relationship Manager:

This robust and versatile platform enabled relationship managers to spend less time in generating/ configuring the reports, instead

moving to higher order value tasks like customer engagement, analytics etc. This helped them start their day with accurate, real-time comprehensive coverage of information available at their fingertips for effective decision making.

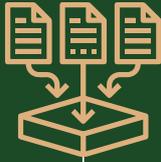
The eMACH-Sigma Outcome:

The platform provided a robust, scalable, and intuitive reporting ecosystem that integrated seamlessly with the Bank's existing digital infrastructure. This helped over 4K+ Relationship Managers, along with Operations and Business Teams boost their decision making process. This also brought down the report creation time enabling faster turnaround times for new reports and changes in existing reports with utmost accuracy.



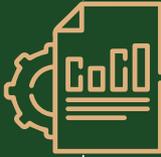
More than 80 unique wealth management reports were configured & delivered as per the Banks' requirement.

KEY FEATURES of eMACH-Sigma



Data level configurations

- Data Aggregation from multiple systems/ sources
 - Integration with REST Web Services/ DB Servers
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Report customizations

- Report template & branding capability
 - User level preferences using "Derived reports"
 - Data filtering options (Group, sort, filter etc.)
 - File name logic configuration
 - Language, Currency & multi-format selection
-



Grouping & Scheduling

- Report and Criteria Grouping
 - Report scheduling & failure-retry automation
 - Batch report generation
 - Notification message & channel configuration
-



Dashboarding and Visual Data Representation



Security:

- Data & report entitlement
- Role-based access configuration
- Password protection and Masking
- Audit Logger

KEY HIGHLIGHTS

80+

wealth reports delivered with
an average performance of

40 sec / 4.5 Lakh
records

4000+

Relationship
Managers
along with
Operations and
Business
Teams

40K+

reports
generated
monthly for 4.5
lakh customers

Customer Analytics &
AUM Trend Analysis
Reports with 40+
dimensions generated
in an average time of
90 secs.

