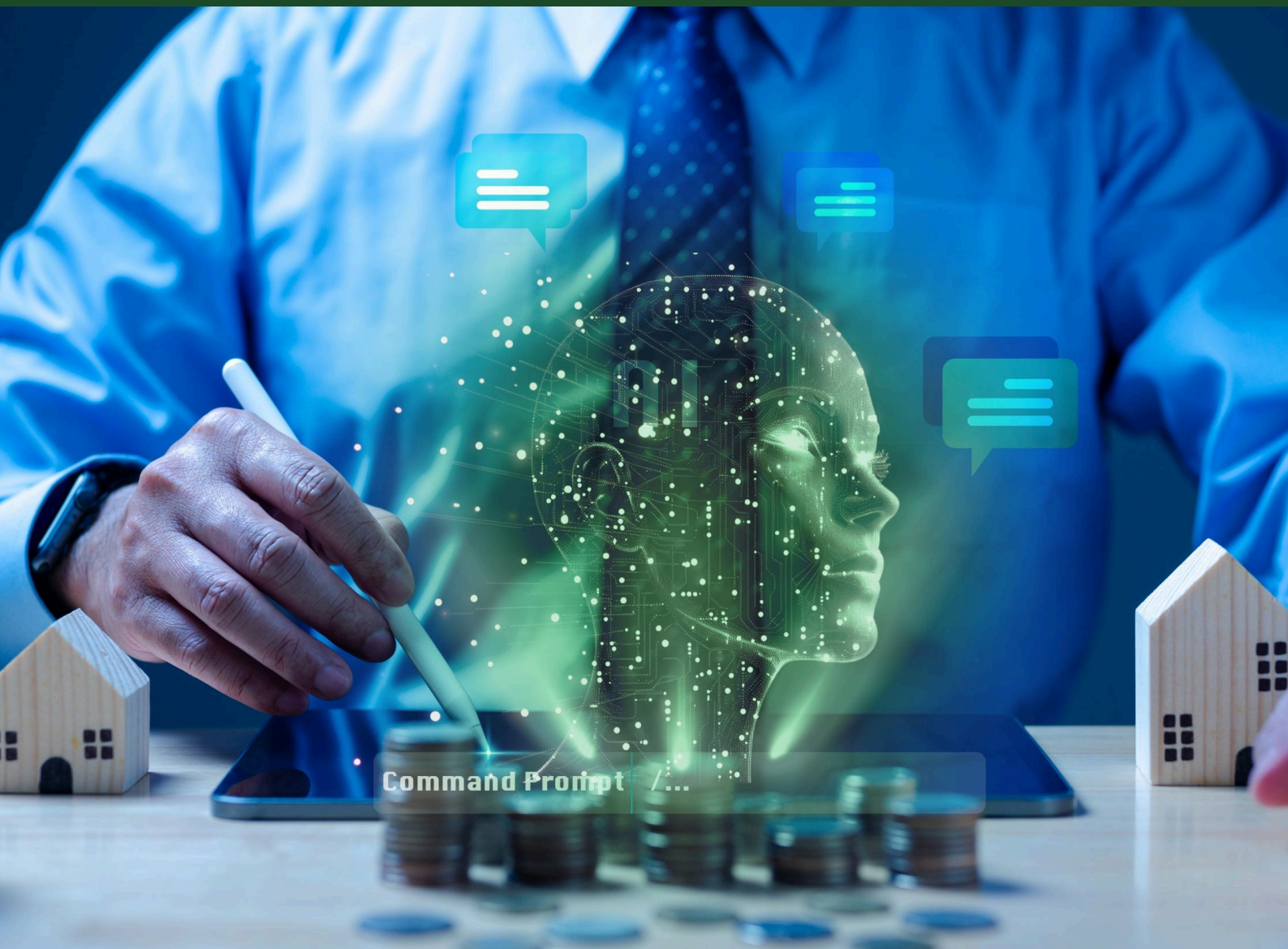


AI-Led Digital Wealth Platform Launch

for One of South Asia's Largest Financial Services Groups

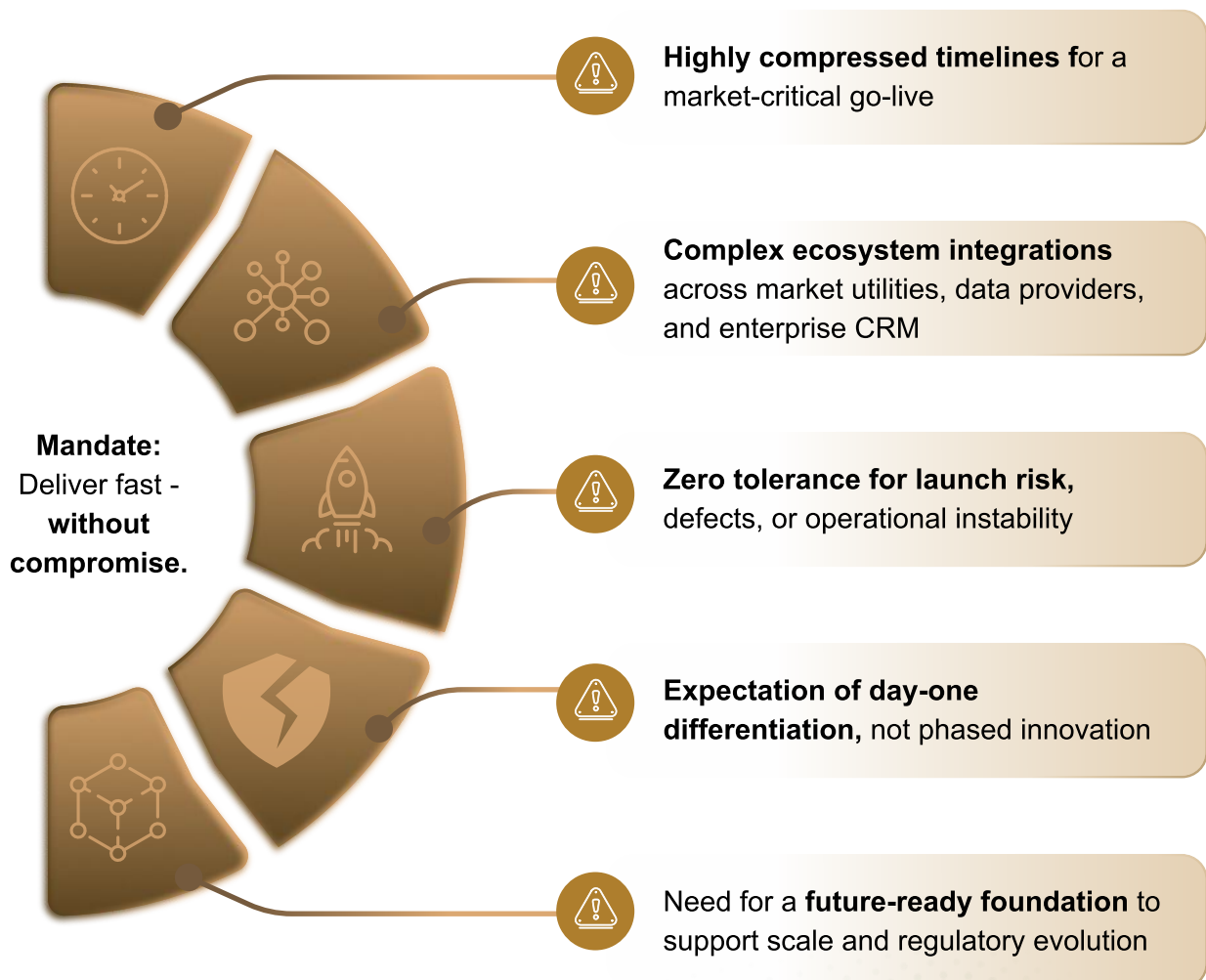


Client Overview

One of **South Asia's largest financial services groups**, formed as a high-profile joint venture between a digital-first financial ecosystem and a globally recognised investment management organisation.

Backed by strong brand equity, distribution scale, and capital strength, the organisation set out to **enter the wealth management market with confidence, credibility, and clear day-one differentiation.**





The Challenge



The Solution

An AI-led, platform-first digital wealth implementation, delivered using a composable architecture and intelligent automation.

Core Solution Capabilities

	<p>AI-Led Digital Wealth Platform</p>	<ul style="list-style-type: none"> • End-to-end wealth capabilities across onboarding, portfolio management, operations, and advisory workflows • API-first architecture enabling seamless ecosystem integration • Designed for scalability, regulatory change, and future product expansion
	<p>Intelligent Portfolio & Advisory</p>	<ul style="list-style-type: none"> • Automated portfolio rebalancing for real-time optimisation • Held-away asset aggregation across mutual funds, equities, and external investments • Unified 360° wealth view enabling richer advisory conversations
	<p>Operational & CRM Enablement</p>	<ul style="list-style-type: none"> • Integrated CRM workflows supporting advisor productivity • Real-time operations dashboards for transaction monitoring and exception management • Straight-through processing to reduce manual intervention
	<p>AI-Driven Delivery Acceleration</p>	<ul style="list-style-type: none"> • AI-assisted testing and validation embedded pre-UAT • Early risk identification, improved coverage, and higher delivery certainty

The Outcome

Business Outcomes

Early and confident market entry

1

Differentiation available on Day 1

2

Strong operational readiness to support scale

3

Positioned as a **technology-led wealth provider** in a competitive market

4

Quantifiable Impact



Delivered 3 weeks ahead of committed go-live (D-3 OTIF)



AI-led testing and validation embedded pre-UAT, materially reducing delivery risk



35+ APIs mapped and operationalised across critical wealth journeys



Zero critical issues at go-live, enabling confident market entry



First-of-its-kind integrations delivered at launch across market utilities, portfolio platforms, and registrar systems

Why This Matters

This engagement demonstrates how **AI-led platforms and disciplined execution** can transform large-scale financial services launches:

- Speed achieved **without sacrificing quality or compliance**
- Innovation delivered as a **launch differentiator**, not post-go-live
- **A scalable, future-ready digital foundation** supporting long-term growth

Conclusion

By combining **AI-led delivery, platform-based architecture, and deep domain execution**, the programme enabled one of South Asia's largest financial services groups to launch its wealth platform with **certainty, credibility, and competitive advantage**.

The result is a **scalable, intelligent digital wealth foundation** - built not just to launch, but to lead.

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