

AI-Led Robo-Advisory Platform Launch

for a Leading Financial Services Group in the Middle East



WealthForce.ai

AI AND DATA EMPOWERED
RELATIONSHIP MANAGER

Background

The client is a **leading financial services group in the Middle East**, operating across brokerage, asset management, and investment services. With a strong domestic presence and global partnerships, the organisation plays a key role in advancing financial innovation aligned with **Saudi Vision 2030**.

To expand digital wealth access and establish market leadership, the client set out to launch a **first-of-its-kind Robo-advisory platform** for the region.

The Problem



No existing **Robo-advisory benchmark** in the regional market

Requirement for a **direct-to-customer (DIY)** mobile and web platform



Complex integrations with **global fintech and trading systems**

Zero tolerance for delivery risk due to regulatory and reputational impact



Need for a **scalable, future-ready digital wealth foundation**

The Solution

An AI-led, platform-first Robo-advisory solution delivered using a composable architecture, enabling intelligent automation, transparency, and delivery certainty.

Key Solution Capabilities



Fully automated **Robo-advisory engine** delivered via DIY app and web portal

Basket-based investing with auto rebalancing and automated order placement



Goal-based investing journeys, including dynamic Goal Glide Path

Enablement of **systematic investing (SIP)** and **systematic withdrawals (SWP)**



Enhanced portfolio transparency through **geographic and asset-class look-through**

Technology & Platform

eMACH.AI-led architecture providing a scalable, data-stable foundation

eMACH.ai

API-driven integration with **ecosystem platforms**



First-ever integrations with global fintech providers, including **Advent and Mubasher**



Purple Fabric AI-led testing and validation, embedded pre-UAT to reduce delivery risk



The Outcome

Business Outcomes

Launched the **first Robo-advisory platform of its kind in the Middle East**

1

Established the client as a **regional wealth-tech pioneer**

2

Delivered a **stable, scalable digital wealth** platform ready for growth

3

Strengthened investor trust through automation, transparency, and precision

4

Quantifiable Impact



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



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



First-of-its-kind Robo-advisory capabilities launched in the region



Zero critical issues reported at go-live



First-ever integrations with global financial technology providers

Conclusion

This engagement demonstrates how **AI-led platforms and disciplined execution** can enable first-to-market innovation without compromising stability or compliance.

By combining **Robo-advisory intelligence, platform-based architecture, and Purple Fabric-led delivery certainty**, the programme has laid the foundation for **long-term digital wealth leadership in the Middle East**.

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