

Engine Insights

February 2025

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Hello,

This month, we're kicking off with the launch of Stifel Discover, powered by MFeed, and our integration with Nova Credit—two milestones that reinforce our commitment to elevating consumer finance. These advancements deliver more personalized, data-driven experiences that enhance accessibility and engagement. As we head into a busy spring event season, we look forward to connecting with our partners and friends in person to explore the future of financial services together.

Product Updates

MFeed goes live with Stifel Discover

We recently celebrated the launch of [Stifel Discover](#), a new Stifel-branded content feed within the Wealth Tracker app from our client, Stifel Financial Corp. Powered by MFeed, Stifel Discover transforms how clients engage with Stifel's research and thought leadership, delivering timely, personalized insights through a dynamic experience.

Its key features include:

Proprietary Insights – Research tailored to users' portfolios, market interests, and financial goals, covering 2,000+ global stocks.

Personalization & Timeliness – Real-time updates surface relevant, high-impact content based on user preferences and market trends.

Seamless Access – Integrated into the Wealth Tracker home screen with categorized content for easy browsing.

Advisor Customization – Future updates will allow advisors to tailor client feeds based on financial life stages.

Learn more about MFeed

Enhancing credit decisioning with cash flow analytics

MoneyLion's partnership with Nova Credit brings powerful cash flow underwriting capabilities to our hosted decisioning platform, enabling lenders to leverage deeper insights into consumer financial behavior. With the integration of Nova Credit's Cash Atlas™, credit issuers within the MoneyLion ecosystem can now incorporate consumer-permissioned bank transaction and cash flow analytics data into their decisioning models, providing a more holistic view of credit risk.

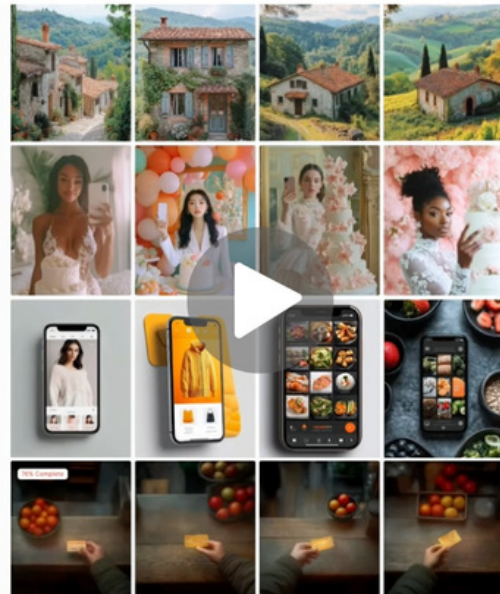
Beyond traditional credit data, this collaboration enhances lenders' ability to assess creditworthiness, expand access, and optimize risk management. For partners interested in activating cash flow analytics for credit decisioning, reach out to discuss implementation opportunities.

Contact us to learn more

Knowledge Sharing



With the help of AI, we captured an important moment at an event where Dee Choubey, Founder and CEO of MoneyLion, discussed the importance of delivering a frictionless shopping experience in consumer finance.



Bill Davaris, Co-President of Malka Studio, shares his perspective on making your brand the ultimate destination in this 45-second video.

Industry Trends

A recent survey found that 53% of consumers expect personalized products and services from their financial providers, leveraging the data those providers already have. [5 Emerging Trends in Personalization and CX for 2025](#) explores the challenges of balancing privacy, compliance, and operational efficiency to scale personalization.

In [6 Trends Shaping Financial Advice in the Fintech Era](#), the World Economic Forum examines key insights from its latest report on [financial advice](#) and their implications for financial services companies. The report states: “People seek out one-stop shops that can provide comprehensive, unbiased advice on all their financial needs, supported by long-term plans around major life events.” It adds, “Banks must capitalize on this opportunity by implementing technology such as mobile apps and websites to offer more tailored advice and education.” The report also explores the roles of the ‘finfluencer economy,’ AI, and fee-based advice versus commission-driven financial consulting.

Events

Engine Insights CXO Webcast Series

How Embedded Finance is Powering a Frictionless Financial Shopping Experience

March 27 | 2 - 3pm ET

Join us as we explore:

Bringing Retail-Like Convenience to Financial Services – Can financial institutions replicate the frictionless shopping experience consumers expect in retail?

The End-to-End Financial Shopping Journey – What are the key elements, from personalized product matching and decisioning to checkout and beyond?

Addressing Industry-Specific Challenges – What makes financial shopping different, and how can institutions overcome these obstacles to improve customer experience?

Leveraging Data and Technology for Smarter Decisioning – What role do embedded finance, open banking, and AI-driven personalization play in enabling a seamless decisioning process?

Speakers:

Taira Hall, Head of Payments, Citizens Bank

Jon Kaplan, Chief Revenue Officer, MoneyLion

Mark Valentino, Head of Business Banking, Citizens Bank

Register

MoneyLion is a proud Silver Sponsor at Fintech Meetup

March 10-13, 2025, Las Vegas

Visit us at Booth #1232 to meet our executive team and product specialists. We'll be offering live demos on how Engine powers collaboration across its network of 1,200+ partners, enabling personalized, real-time product matching and content delivery—all while democratizing financial services for consumers.

Book a meeting with a member of our exec and product team

We're hosting an invitation-only dinner for our valued clients and partners.

VENUE

CUT by Wolfgang Puck

DATE

Tuesday, March 11

TIME

6:30 - 9:00 PM PT



Request an invitation

MoneyLion is a proud Gold Sponsor at Financial Brand Forum

April 14-16, Las Vegas

Our team is excited to attend the Financial Brand Forum this year, and we'll be sharing details about our presence at the conference soon.

Book a meeting with a member of our team

Welcome New Partners



For more information, you can keep up to date on the latest Engine by MoneyLion news by visiting our [Press Page](#).

Thanks!

The Engine by MoneyLion Team

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