

AI-Powered Financial Services Assistants

Empowering financial institutions to deliver real-time, context-aware insights from their existing knowledge base, enhancing client engagement, accelerating decision-making, and mitigating risk.

Automated document generation, intelligent search and chat to enable:



Enhanced Client Satisfaction



Operational Efficiency



Risk-Aware Decision Making

Enhance retail efficiencies with DataQI Assistant



DataQI

Built for Enterprises

Flexible Deployment

Secure by Design

Pre-Built Financial Services Assistants



Audit Intelligence Assistant

Scans financial data to uncover issues and accelerate regulatory prep

Intelligent Search

"Flag irregular transactions over \$10K"



Compliance Report Assistant

Generates audit-ready reports to expedite reviews and compliance

Document Generator

"Create a performance summary of our institutional lending book for May"



Client Service Assistant

Equips teams with instant, compliant answers to improve response and resolution times

Instant Chat

"What's our current onboarding process for high-net-worth clients"

**With 25+ more pre-built assistants ready to deploy across
Intelligent Search, Document Generator & Instant Chat**



Privacy First

Data stays private to ensuring compliance and security



Accurate Outputs

Precision outcomes based on your organizational data and defined guardrails.



Competitive Pricing without Compromise

More features at a lower cost than other leading Gen AI platforms.

Connects to Leading Finance Applications



**Power Financial Productivity with 150+
Available Enterprise Connections**