

GENERATIVE AI USE CASES FOR ASSET MANAGERS

SALES & CLIENT SERVICE			PRODUCT	INVESTMENT & RESEARCH			MID & BACK OFFICE		
1	2	3	4	5	6	7	8	9	
Sales and fund raising	Marketing	Client servicing	Product development	Portfolio management	Research	Trading	Risk, legal and compliance	IT and operations	
1A Hyper-personalization of customer journey with tailored communications	2A Drafting of customized marketing materials targeted to multiple channels	3A Interpretation of inquiries and matching with similar questions and corresponding answers	4A Summary and comparison of market intelligence, including trends, competitor offerings	5A Scraping and transforming large amount of information from news for prediction of market movements or risk of securities	6A Synthesis of research and extraction of data from multiple sources, including data room	7A Substantiation of trading wheel rules by incorporating market information real-time	8A Searching and summary of legal and compliance documents	9A Code generation and debugging	
1B Drafting of customized insights about clients and talking points for sales	2B Synthesis of market feedback and customer data to generate marketing campaign plans	3B Drafting of customized periodic investor reports	4B Brainstorming of new product/solution ideas, tailored to client needs	5B Generation of market or risk scenarios and synthetic historical and predicted data for backtesting	6B Drafting of market commentaries and outlooks	7B Intelligent hedging and unwinding	8B Drafting of risk and performance reports	9B On-demand customized reporting of financials, operational incidents, KPIs, and more	
1C Drafting of customized pitch or RFP response documents			4C Drafting of business plan for committee approval	5C Proposal of new investment ideas and selecting relevant securities from a defined universe	6C Drafting of investment committee documents	7C Proposal of trade optimization strategy by synthesizing counterparty price elasticity information	8C Augmented security master updates	9C Paperwork/form assistant that pre-populate data, suggest complete version	

5 core capabilities Gen AI enables

Interpreting information and learning patterns

Searching for information

Responding to and interacting with humans

Summarizing and organizing information

Creating and customizing new content