

AI KEY TO OPTIMIZING INSTITUTIONAL INVESTMENT DATA

Artificial intelligence (AI) is no longer just a focus in the tech industry. Asset owners and asset managers increasingly recognize that they can use AI to efficiently analyze data, in areas ranging from investment decisions to marketing to customer service.

FINANCIAL SERVICES (FS) FIRMS ARE AT AN EARLY STAGE BUT LOOKING CLOSELY AT AI:



20% of FS firms globally currently use Al¹

41% are planning to start in the next 12 months¹



53% have or are planning a number of Al initiatives²



Data science and AI expertise projected to be among top desired job skills over next 5-10 years³

UPTICK IN INSTITUTIONAL INVESTORS' AI INTEREST:

"Just as electricity made lighting much more affordable... so Al will make forecasting more



affordable, reliable and widely available."⁴



integration into the

investment process⁵



think the number of data sets will increase significantly⁵

77%

For investment research, 77% think AI will have the greatest impact on analyzing news, content and data³

TOP CURRENT AND EXPECTED USES OF AI IN FS:6



Increase productivity of advisors



roductivity Improve portfolio visors management



Detect and anticipate cybersecurity risks



Improve predictive analysis



Track and assess market opportunities



Find and attract investors



Monitor investor behaviors



Create automated financial advisors



Optimize and streamline back office

Automate key elements of compliance

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- 3. Thomson Reuters and Greenwich Associates. https://blogs.thomsonreuters.com/financial-risk/investment-management/future-investment-research/
- 4. The Economist. https://www.economist.com/special-report/2018/03/31/non-tech-businesses-are-beginning-to-use-artificial-intelligence-at-scale
- 5. Thomson Reuters and Greenwich Associates. https://www.thomsonreuters.com/en/press-releases/2018/june/half-of-institutional-investors-expect-to-rely-more-heavily-on-ai-to-help-inform-investment-decisions-in-next-5-10-years.html
- 6. Roubini Thoughtlab. http://www.oracle.com/us/products/applications/wealth-report-summary-full-report-3942059.pdf

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