

Smart Investment Recommendation Assistant

Where Investment Meets Artificial Intelligence



Cilent Overview

A financial platform helping individuals and small businesses make smarter financial decisions through AI-driven tools and real-time insights.

Key Focus Areas



Gamified Financial Learning



Investment Insights



Smart Budgeting



Goal-based Planning



Current Interaction Flow

CASHVISORY

User
Submits
Enquiry



Cashvisory
Advisor Receives
Enquiry



Advisor
Consolidates
Response



"How do I start investing?"
via email or form

Manually reviews and
understands user needs,
leading to longer processing

Time-consuming search
through PDFs and policies
for answers

Operational
Challenges

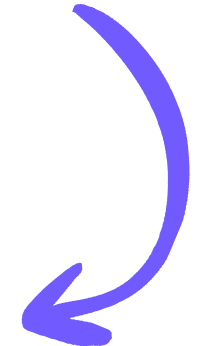


- No centralized query tracking
- Delayed follow-ups on enquiries
- Advisors stuck on repetitive tasks

Advisor Creates
Response for User



Advisor **customizes**
responses manually for
each user

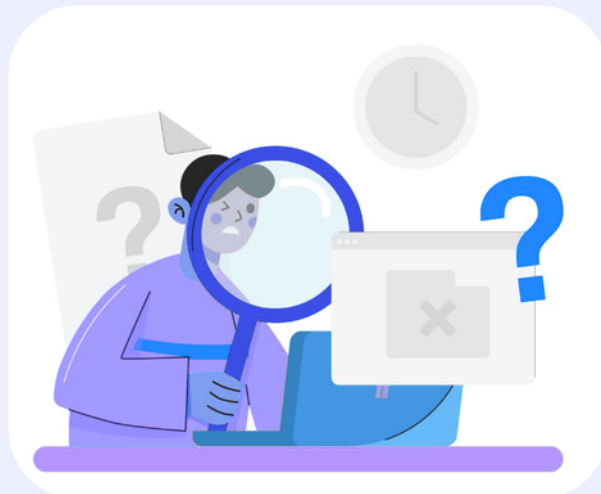


Business Challenges



MANUAL INTERVENTION

Requires constant staff attention for customer queries.



UNSTRUCTURED QUERIES

Results in delays and inefficiencies in responses.



COMPLEX FAQs

Users are confused by jargon-filled content.



INFORMATION OVERLOAD

Difficult for users to locate relevant answers within FAQs.

Solution: Agentic AI Driven Financial Literacy

Agentic AI-driven investment guidance through intelligent automation and expert synergy.



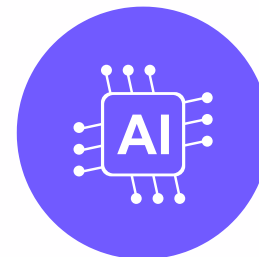
Core Intelligence

Our agentic AI chatbot empowers users to make smarter financial decisions by combining advanced automation with expert advisory access.



SMART QUERY UNDERSTANDING

Identifies user intent and delivers tailored responses



AGENTIC AI KNOWLEDGE ENGINE

Processes financial data to provide instant insights



EXPERT CONSULTATION LINK

Connects users with certified financial advisors.



REAL-TIME INSIGHT DELIVERY

Updates recommendations based on live data.



INVESTMENT LEARNING HUB

Explains financial concepts within the chat.



DATA SECURITY LAYER

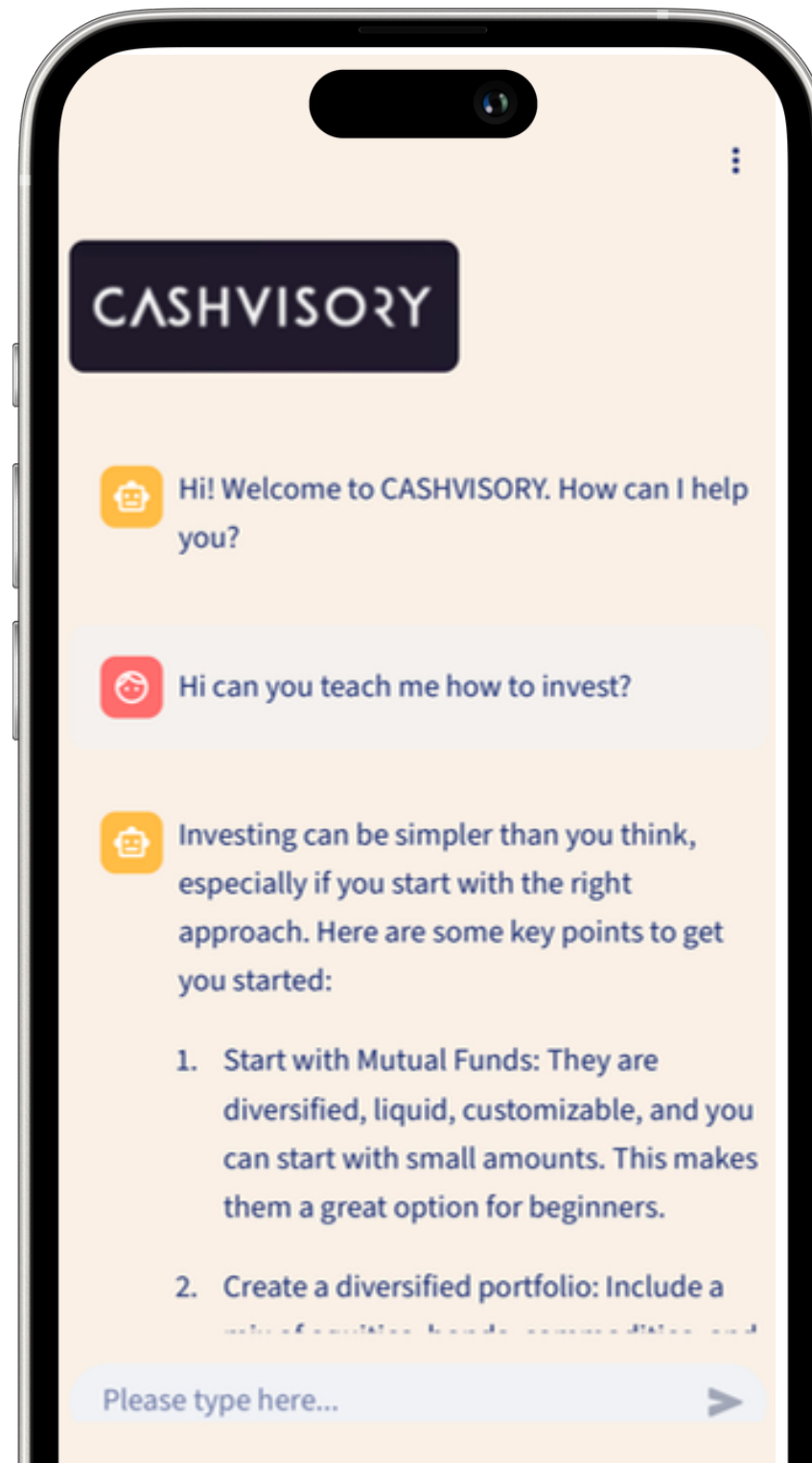
Ensures encrypted, private user interactions.



User Experience

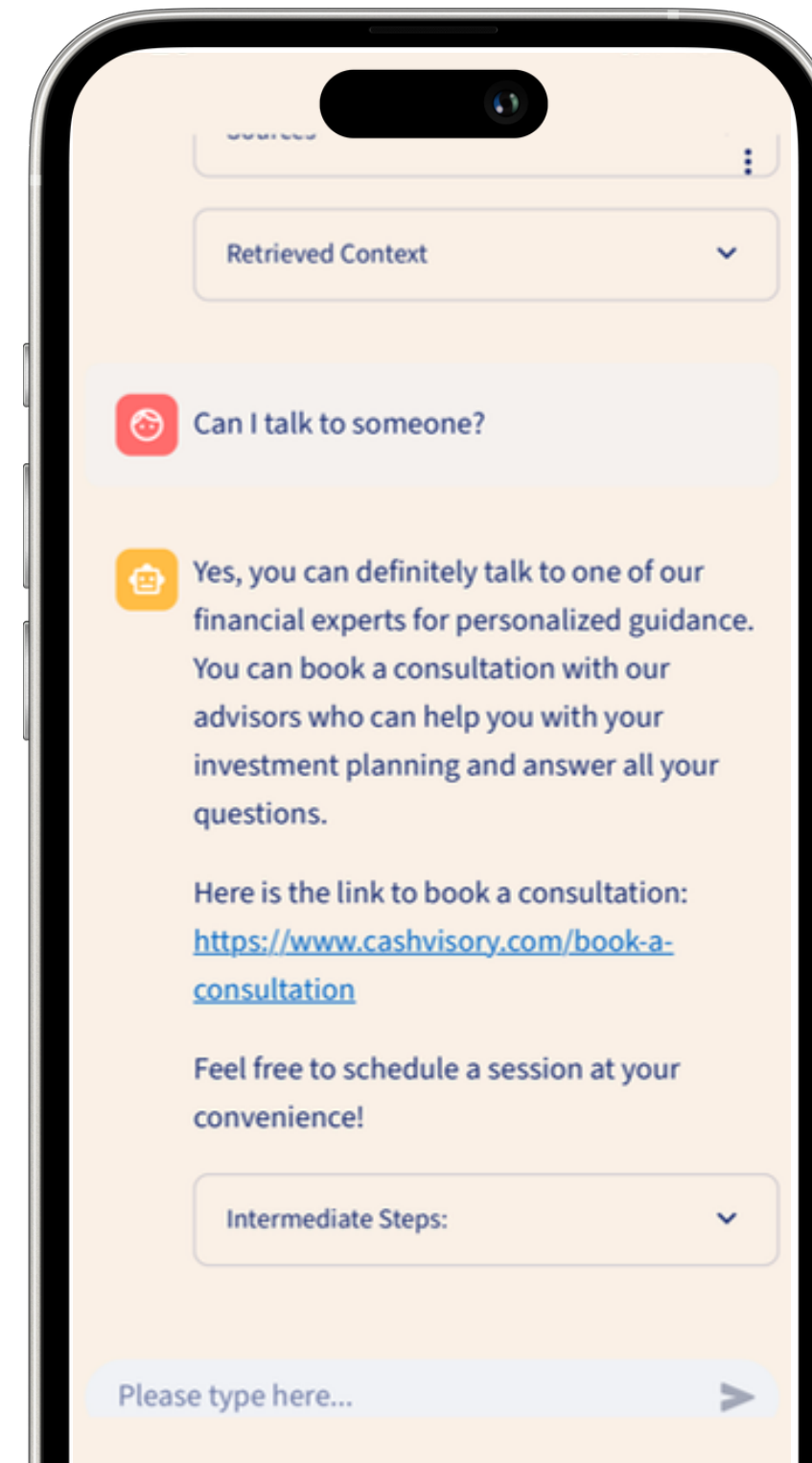
Smart Query Interaction

The Agentic AI assistant **simplifies financial advisory** through interactive, guided experience.



Seamless Expert Advice

While giving users the **option to consult experts for deeper support.**



Operational Intelligence

-Admin Control Panel



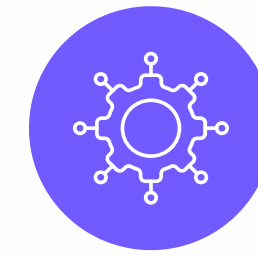
FILE MANAGEMENT SYSTEM

Admin can upload, preview, and delete knowledge files in real time.



ADMIN DASHBOARD

View file stats, type distribution, and performance metrics.



SYSTEM CONTROL PANEL

Run data pipelines and rebuild the chatbot's vector base.



KNOWLEDGE ENGINE SYNC

Auto-update AI knowledge after file or data changes.



CLOUD SECURITY CENTER

Monitor encryption, access logs and storage health



PERFORMANCE TRACKER

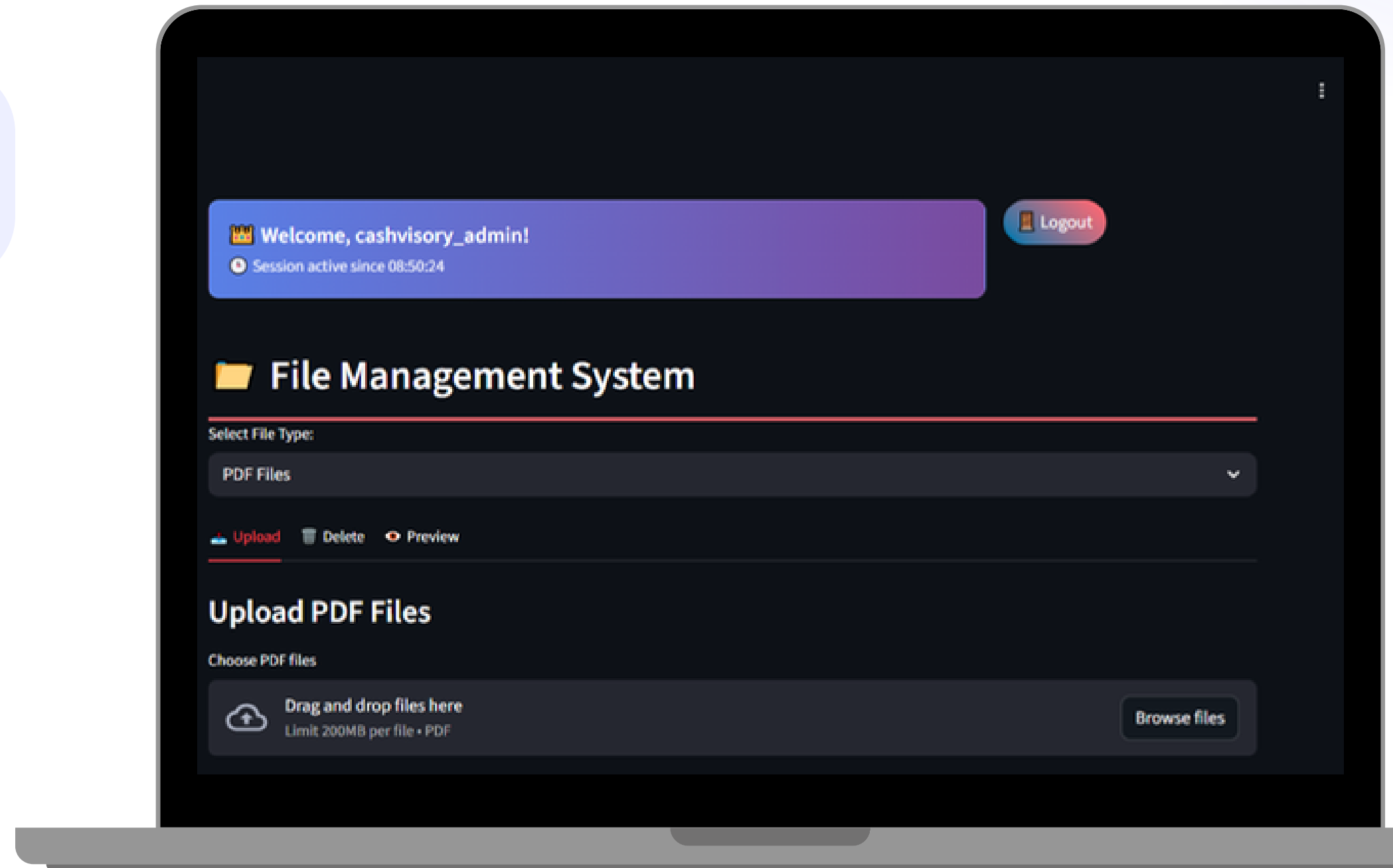
View system load, uptime, and data processing speed.

Operational Intelligence

-Admin Control Panel

Advanced File Management System

Enables admins to **effortlessly control, organize, and update** AI knowledge assets.

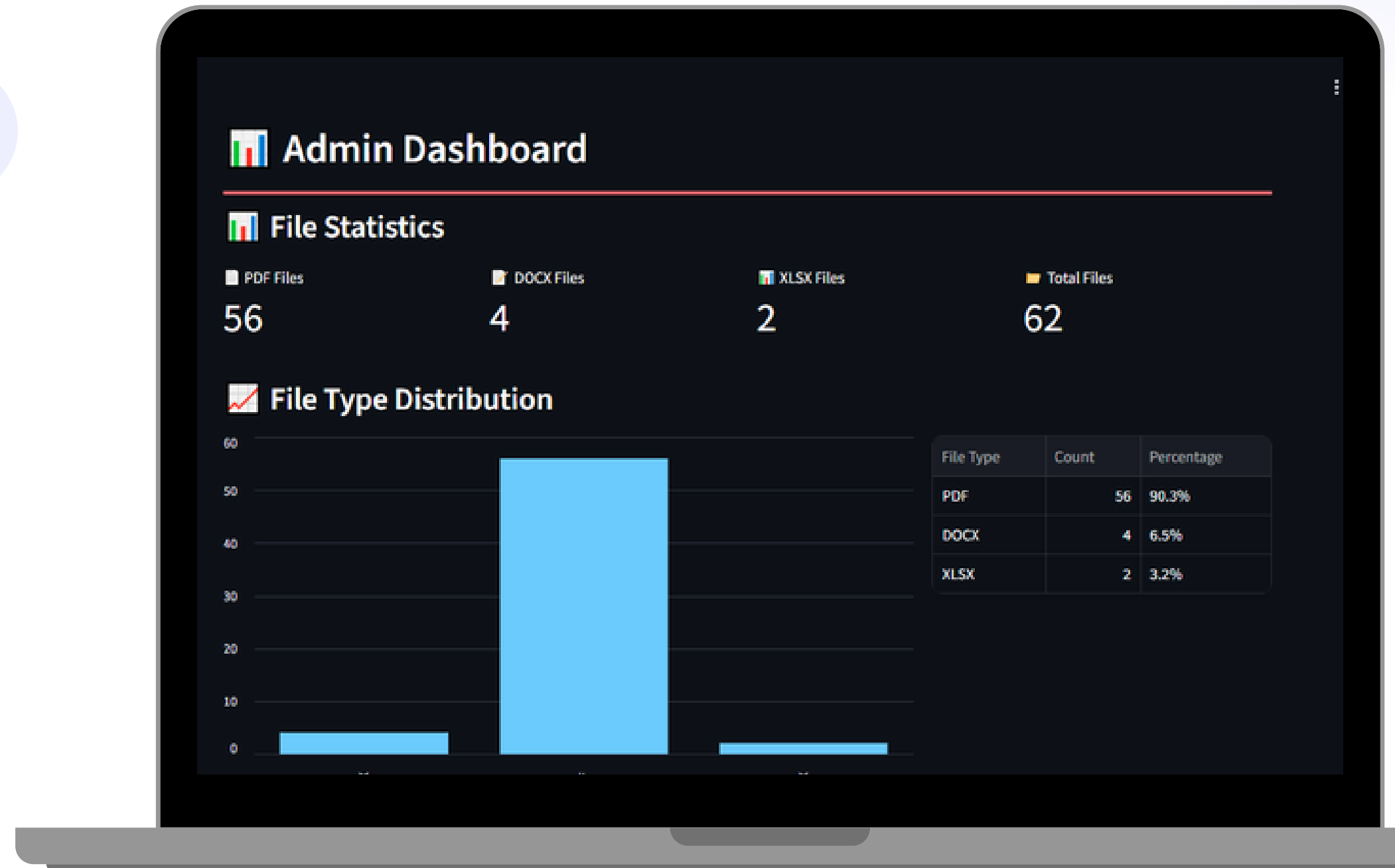


Operational Intelligence

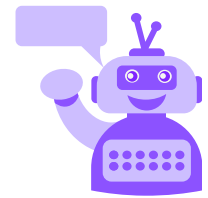
-Admin Control Panel

Dynamic Admin Dashboard

Real-time view of file stats, system load, and performance metrics



AI System Architecture



AI Backend Flow

Data Processing



Content Ingestion



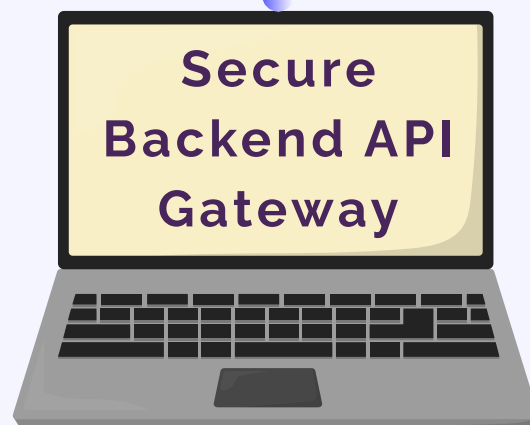
Information Chunking



Knowledge Index Building



Secure
Backend API
Gateway



User Interaction Flow

Receives User Query



"How do i invest?"



Generates Agentic
AI Response



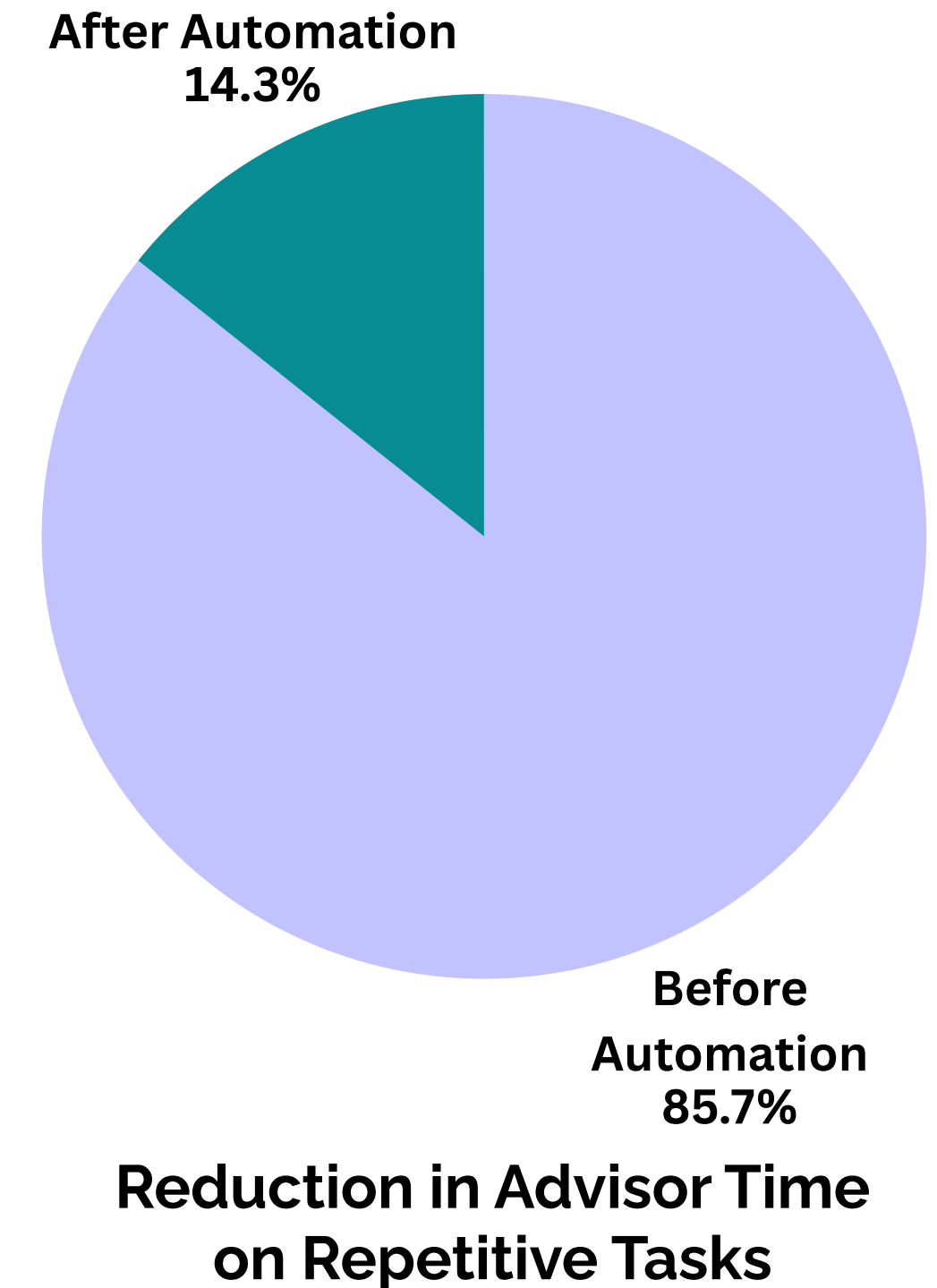
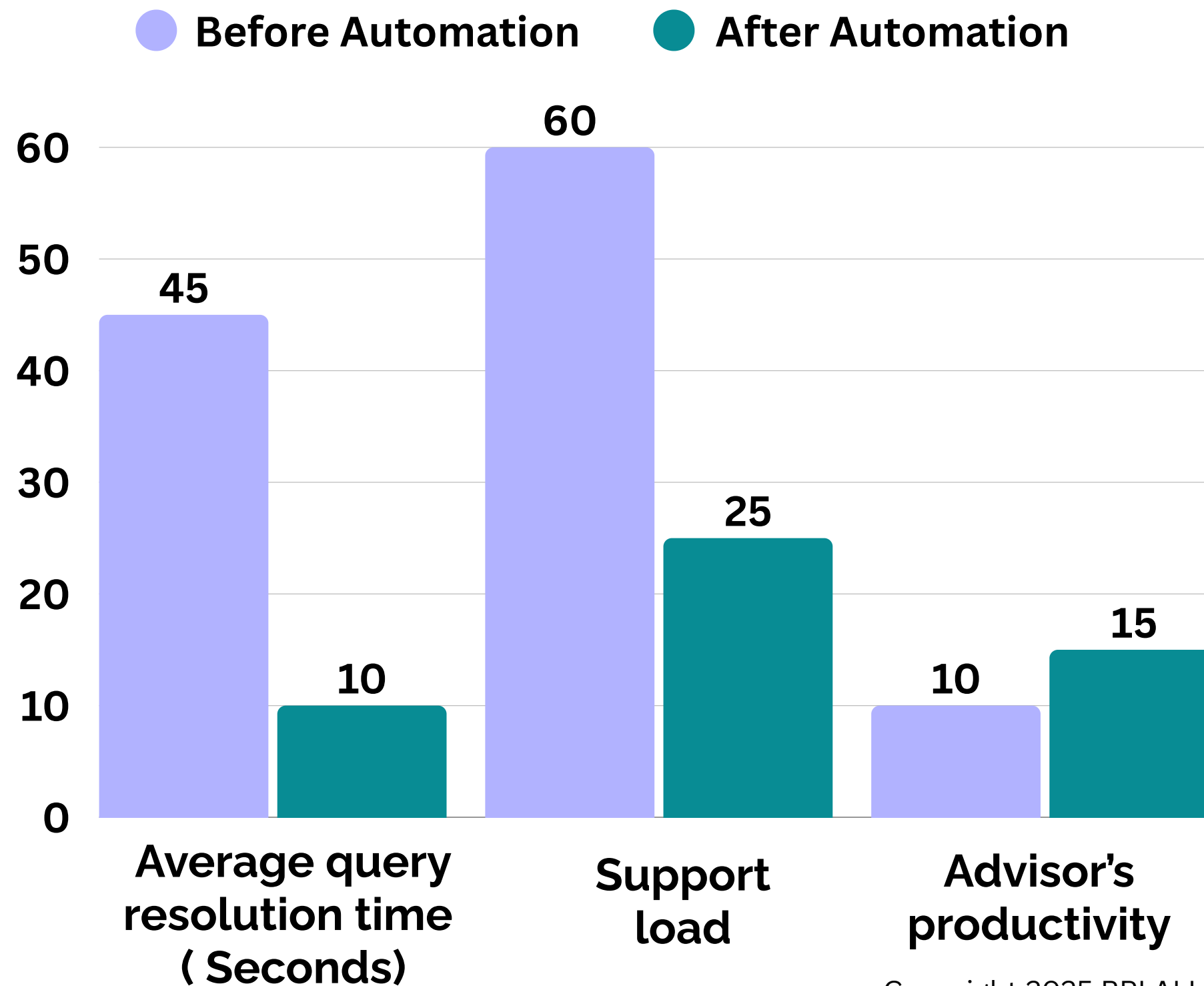
Response Display



Agentic Financial
Knowledge Engine



Impact After Agentic Automation



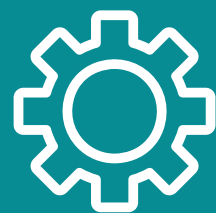
AI-Driven Operational Gains

CASHVISORY

70%



Efficiency
Improvement
in handling
client queries



35%



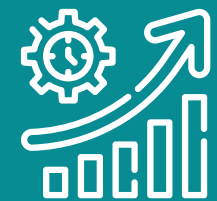
Cost
Reduction
in advisor's
Operations



50%



Productivity
Increase
for financial
advisors



RPI
AI Lab

Our Agentic AI Capabilities in Financial Services

1. Banking & Fintech Sector

Smart Investment Chatbot

Delivers real-time personalised answers for compliant, accurate recommendations tailored to individual investment needs.

Fraud Detection & Transaction Intelligence

Monitors transactions and patterns in real time to detect anomalies, reduce risk, and protect assets.

2. Wealth & Asset Management

AI-Powered Portfolio Insights

Analyzes market data and user risk profiles to suggest customised asset allocations and intelligently identify emerging investment opportunities.

Document & Process Automation

Automates reading, indexing, and retrieving investment reports, contracts, and advisory documents, enabling faster decisions.

Our Agentic AI Capabilities in Financial Services

3. Insurance & Claims Operations

Claims & Policy Automation

Extracts key information from insurance policies and past claims to speed up processing and support faster, more accurate decisions.

Automated Risk & Compliance Monitoring

Scans communications, applications, and transactions to flag anomalies and ensure underwriting and policy compliance.

4. Financial Operations & Compliance

Audit & Governance Intelligence

Automatically reviews documents and activities to spot compliance gaps and maintain audit readiness.



Get in Touch

Transform your financial ecosystem with **RPI AI Lab's** next-generation AI solutions that deliver real-world impact.

BOOK A DEMO TODAY

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Building ideas for 20+ years



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