

Wealth management Bot



Profile

Live chatbot handling Portfolio values & services including assisting users on Stock information & buying options

Challenges

- Integration
- Implementation
- Environment
- Security access

Requirement

Pilot requirement for customers to help understand Portfolio values and their performances for wealth management. Including stock options details and buying them

Feature Details

- **Get Portfolio value**
Bot assists users in highlighting the portfolio values as per the contract business cases
- **Get Portfolio performance**
Bot assists in comparing the returns earned on portfolio investment with a benchmark Portfolio
- **Get stocks**
Get info on the stocks a user has invested and their current value as per market that day
- **Buy stock**
Bot helps in buying the stocks based on invested Portfolios

Solution Benefits

- Ease of information disbursement
- Removing the option of human agent for trivial info display
- Easing the complex scenario enactment
- Providing necessary documents for tasks required.