



Success stories in predictive analytics in Financial Services

Top 50 Best Companies to Work for in
India 2016 – Silicon Review Magazine

Predictive Analytics Company of the
Year 2014 – CIO Review Magazine

Top 20 Company in India - TiE Lumis
Entrepreneurial Excellence Awards 2013

Top 50 Big Data Analytics Companies in
India 2013 – CIO Review Magazine



A large brokerage firm reduced fixed compensation costs through performance based advisor segmentation and realignment

Objectives

Identify top performers & realign underperforming advisors without adversely impacting customer engagement and topline revenues

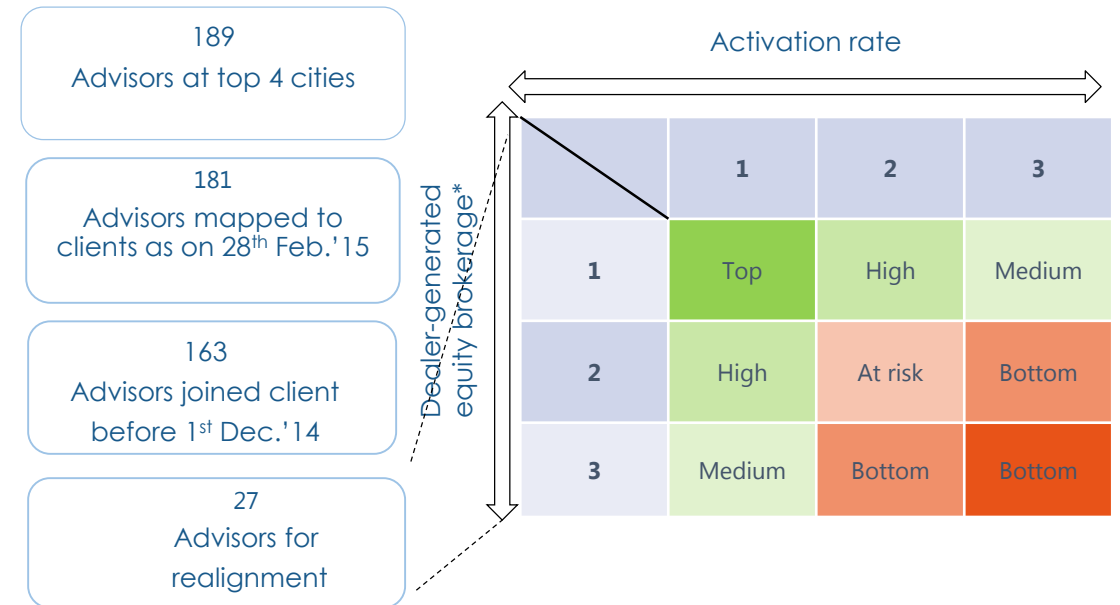
Our Approach

Statistical advisor segmentation based on factors such as:

- Last 6 months brokerage
- Client activation rate
- Clients by self vs. Advisor trades
- Clients by segments
- Advisor's age, gender, education, total exp., trainings attended

Impact

- Realigned advisors with low activation rates and advisor-generated brokerage reducing fixed compensation costs
- Realigned advisor-mapped clients to online trading channel based on their self-trading behavior (self-trades via online, mobile)



- Rank 1 on brokerage/activation rate: Dealers with \geq city average + 1 std. dev
- Rank 2 on brokerage/activation rate: Dealers with \geq city average - 1 std. dev
- Rank 3 on brokerage/activation rate: Dealers with $<$ city average - 1 std. dev



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