incedo DQxpert

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Achieving 40% Drop in Reporting Errors for a major Wealth Mgmt firm with DQ Identification & Remediation

Key Challenges

- Data issues creeping in from upstreams and multiple client relationship teams

- Inconsistent data from siloed data sources across 1000+ clients and 50000+ portfolios

- Incomplete and delayed data hampering on-time and accurate reporting to clients

Business Solution

Incedo DQxpert AI-enabled Data Quality Platform

> Identified inconsistent portfolio IDs during market flow calculation

> Observed missing liquidation and inception dates for holdings

> Created a new unique portfolio ID to serve as a reliable reference for holdings

> Implemented logical data imputation steps across the reporting. e.g. update liquidation date when NAV is Zero

Business Impact

15%
Improvement in Customer Satisfaction (C-SAT) Score

40%
Reduction in reporting errors

20%
Recovery in turnaround time (TAT)

Get in Touch

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PJ/31/07/2024