



# CASE STUDY

INCOME MONITORING & ALERT  
SYSTEM

**A**nalyse | **P**redict | **M**onetise

# INCOME MONITORING & ALERT SYSTEM

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## **Overview**

This case study covers implementation of **Income Monitoring and Alert System**, under the umbrella **Capital Market Analytics** services offering

## **Client profile**

A leading financial intermediary recognized amongst the most trusted and reputed brokerage houses in India.

## **Problem Statement**

The main objective of Capital Market Brokers is to cater to the need of investors to mobilize their savings into more productive channels (e.g., Equity, Derivatives, etc.), and the opportunity to gain from this financial intermediation.

To maximize their market share of this opportunity, the Brokers need to do the following:

- Influence the increase of the transactions of their existing Active customers, and
- Influence the activation of their Dormant and Low Activity customers.

## **Solution Offered**

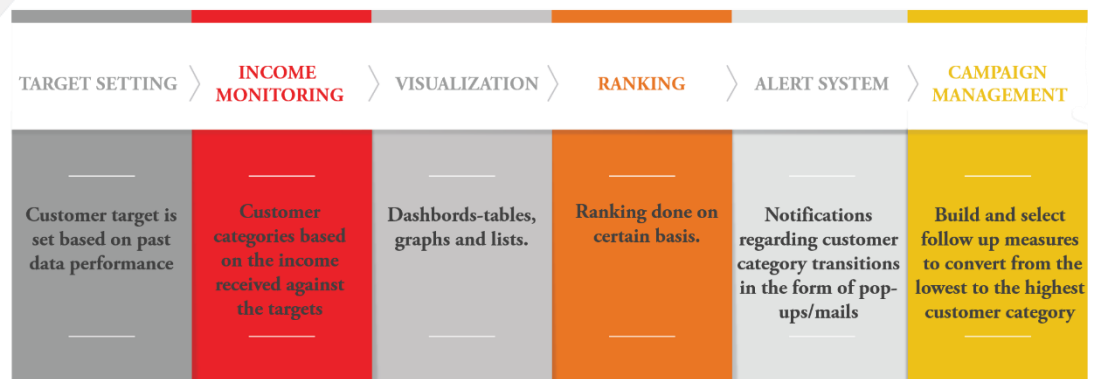
Income Monitoring and Alert System, which provides:

- Income Dashboard(s) in accordance with the overall revenues, and the break-ups by ROs and Customers.
- Real-time enablement (i.e., till yesterday) of the income monitoring and reporting.
- Relationship Officers (ROs) performance monitoring Dashboard basis each of them
- customer's revenue.
- Customer-wise Revenue Alerts, e.g., On-Target, Dormant, etc., and associated Campaign lists.



# Modular Solution

Six Modules, each catering to a specific requirement

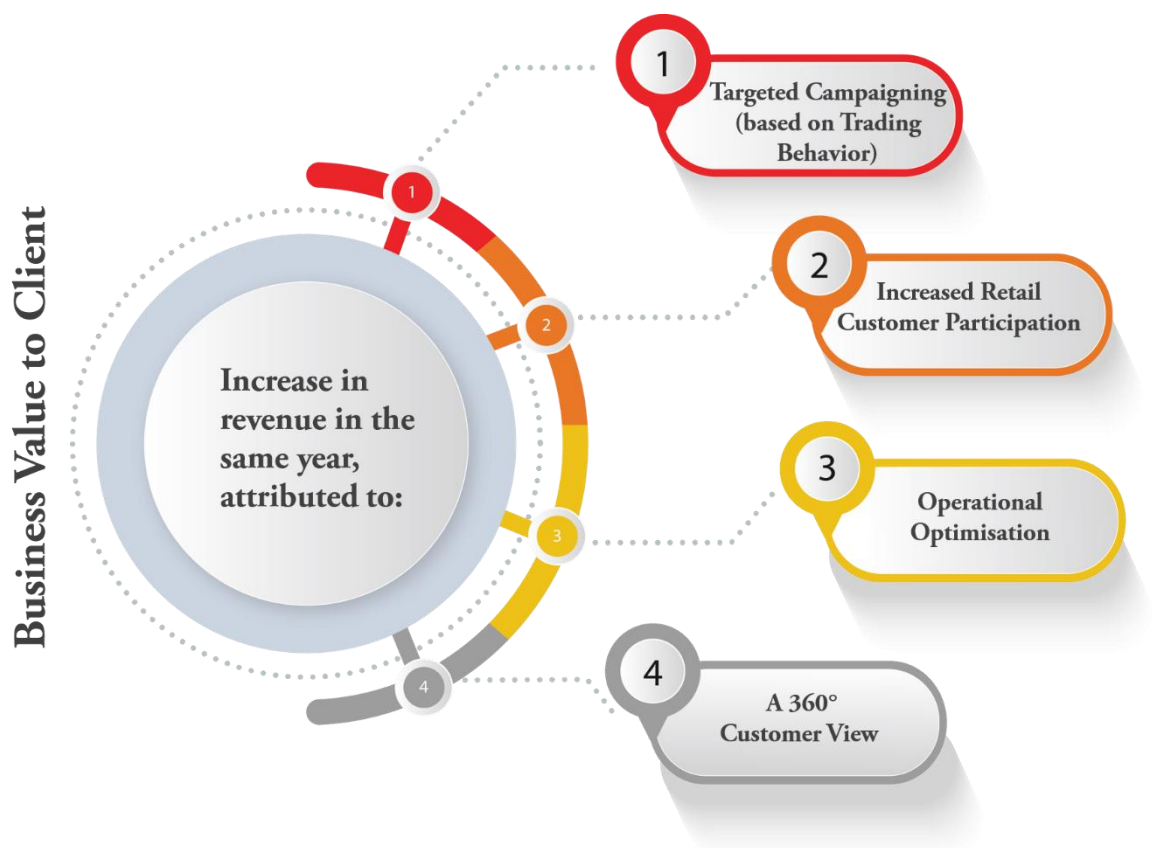


## 1. Dashboards:

- Tables represent the variation between the Planned and Actual Target Income
- Graphs represent the category wise client distribution, and
- Lists highlight the four client categories-Below Target, Inactive, On Target and Significantly below

## 2. Ranking to done based on:

- Top Performing Relationship Manager/Business Associate
- Top Revenue Generating Customers





## About InnoTx

InnoTx Solutions LLC is Data Science and Analytics Company based in UAE. With a team of 180+ professionals spread across India, MENA, Europe and US, we offer AI driven advanced analytics, Big Data Solutions, Digital Platforms, InsurTech & FinTech Advisory and Consulting and Resource Augmentation. Our list of customers includes Banks, Financial Institution, Insurance companies, Power and Utility companies, Education service providers and Retail chains.

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