

PRIVATE EQUITY (PE) + MUTUAL FUNDS (MF) CASE STUDY

PROBLEM STATEMENT (PE)

How might we - streamline our internal deals subscription process in order to grow our market acquisition of Bank of Singapore's clients for alternative investments?

+90% untapped client accounts for alternative investments in the bank currently

X5 in potential AUM growth based on financial growth projection of past 3 years

PROBLEM STATEMENT (MF)

How might we - create a more impactful business by improving the efficiency and scalability with data at the core of advisory and an all-in-one digital platform to create seamless access to information.

-20,000 hours/yr can be saved from digging information so that RMs can focus more on sales activity instead

Regulatory errors will be reduced by implementing our in-house suitability risk engine

WHAT PROBLEMS ARE WE TRYING TO SOLVE?

"Unavailable forms to sign digitally..."

"600-pages PDF documents to pack and share with clients"

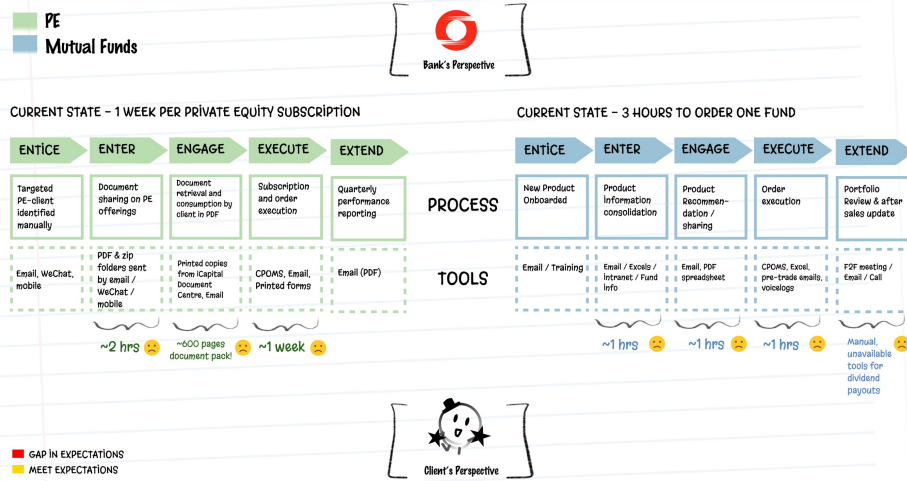
"No standard means to track clients' investment preferences"

"Paper sign-up process takes up to 1 week"

"Numerous excel spreadsheets maintained manually"

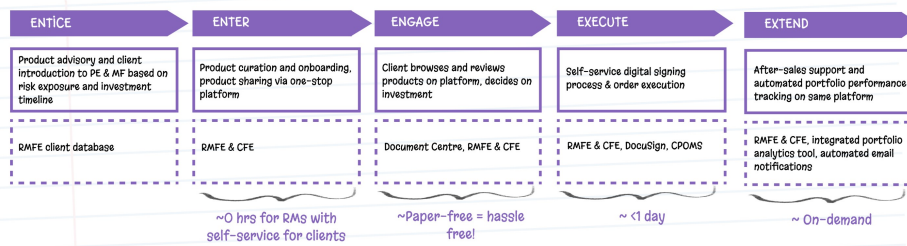
"FDS spend in average 1 hour on searching product information from multiple sources for each deal"

"FDS easily miss regulatory data and manually conduct suitability matching"



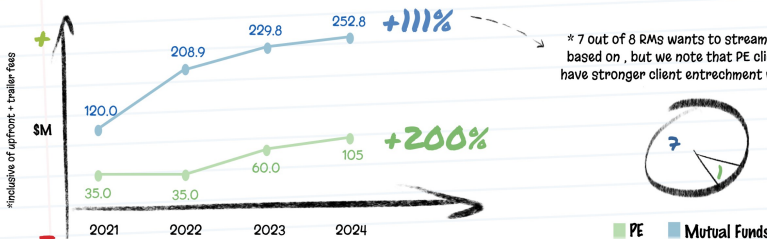
TARGETED SOLUTION WITH 100% DIGITAL PLATFORM

<1 day per subscription process



INCREASING REVENUE GAINS FOR PE + MF

PE has relatively higher upfront fees with long-term recurring revenue (> 10 years)



WHAT OUTCOMES ARE WE EXPECTING?

	Private equity	Mutual fund
UX	<ul style="list-style-type: none"> INCREASED PE SUBSCRIPTIONS CLIENT SELF-SERVICE 	<ul style="list-style-type: none"> CLIENTS TO GET PERSONAL ADVICE AND SELF TRADE
Productivity	<ul style="list-style-type: none"> REDUCE MANUAL WORK AND KEEP PROCESSES TO A SINGLE DAY COMPLETION 	<ul style="list-style-type: none"> REDUCE MANUAL WORK AND IMPROVE EFFICIENCY BY 90%
Quality	<ul style="list-style-type: none"> STREAMLINED DOCUMENT RETRIEVAL AND SUBSCRIPTION PROCESSES 	<ul style="list-style-type: none"> REDUCE REGULATORY ERRORS BY 100%
Benefits	<ul style="list-style-type: none"> FROM 2021 TO 2024, REVENUE IS EXPECTED TO TRIPLE UP TO 3% UPFRONT SUBSCRIPTION REVENUE, 8-10% ROA PER DOLLAR COMMITMENT MINIMISING RISKS IN GROUP AUDIT STRONGER CUSTOMER ENTRENCHMENT 	<ul style="list-style-type: none"> FROM 2021 TO 2024, +94% INCREASE IN AUM, +11% INCREASE IN REVENUE
Cost reduction	<ul style="list-style-type: none"> UP TO 1 week reduction in subscription process per fund deal 	<ul style="list-style-type: none"> +20,000 hours/yr saved in total processes across 400 related RMs

COMPETITORS LANDSCAPE

FEATURES	BANK OF SINGAPORE Lion's Cage - Future Advisor	DBS DBS Online Fund Investment / Private Equity access	UBS UBS NEO	Schroders Fund Centre	CAPITAL GROUP Fund Centre	OCBC Bank Fund Library
Unified cross-assets platform	✓	✗	✓	✗	✗	✗
After-sales analytics dashboard / alerts	✓	✓	✓	✓	✓	✗
Self-service access to product info, investment ideas	✓	✓	✓	✓	✓	✓
Secured and instant communication with RM support	✓	✓	✗	✗	✗	✗
Personalised watchlist and on-demand updates	✓	✗	✓	✓	✗	✗