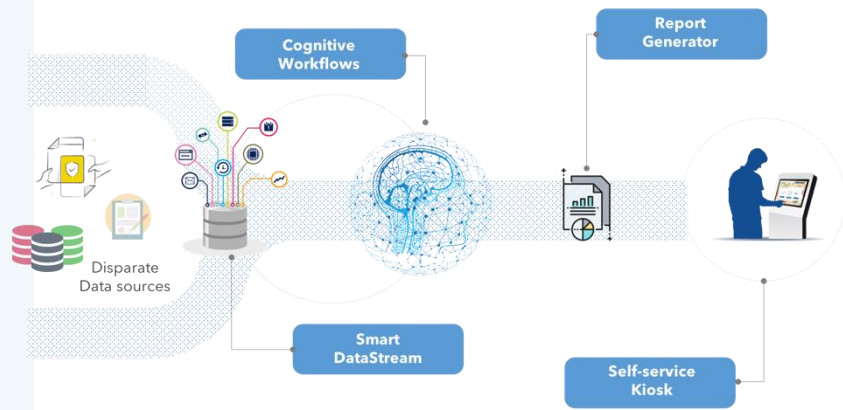


Traditionally, portfolio managers, customer service reps, and brokers keep clients informed on the performance of their investment portfolios through regular consolidated reporting. However, generating these reports are often a cumbersome exercise that require data aggregation from multiple sources, manual parsing of various documents, maintaining auditability of changes, and cross-references from insurance carriers. This multi-pronged exercise takes days to weeks to complete and comes with significant costs to carriers and member firms alike. In addition, these reports have to undergo stringent compliance review, as per regulatory authorities, such as FINRA. This is an unsustainable model in the new normal, where enterprises are challenged to automate these traditional processes and reduce cost by at least 30—50% within months.

## Welcome to AI-aided Reporting.

*Consolidated using Machine Learning, audited by bots, and delivered to a self-service kiosk within minutes.*

Vizru Consolidated Reporting Framework (CRF) is an AI-driven reporting tool designed to digitally gather policy information from multiple carriers and delivers complex policy reviews and KPI reports within minutes. Its *DataStream*, a smart technology that contextually combines disparate data sources using Machine Learning, greatly reduces the amount of manual collection and entry of policy values from disparate sources, such as, carrier websites and policy statements. By extensively employing optical character recognition (OCR) to digitize illustration documents, CRF hunts down data it needs to execute the report. CRF comes with comprehensive audit module, granular editing, and extensible compliance workflows. Lastly, its Dynamic Report Builder transforms the data into meaningful end-user reports that incorporates charts, dashboards, computations and T's&C's to provide customers with a compelling investment narrative.




## Framework Value

**Zero-code Environment for Business Teams:** Enterprises can infinitely extend the framework within weeks. It does not require any IT to modify the environment.

**Regulated Messaging:** Vizru solves the last mile challenge of compliance by ensuring the delivery of the reports through email. Chats are also audited and regulated through smart workflows.

**Multi-tenancy:** Vizru allows enterprises to provide their brokers a robust multi-tenant environment to access the framework ensuring data privacy and sovereignty to their partners.

**Used in Production Environment:** Stress tested and used by financial and insurance companies around the world in production environment.

 **80% reduction of report consolidation time**

## Business Value

- 80% reduction of report consolidation time
- 90% improvement in data accuracy by eliminating manual collection, entry, and reporting
- Inbuilt compliance, regulatory, and audit workflows
- Stores all data in a central repository as per FINRA compliance
- Integrated with DTCC, illustrations, CRM systems, policy documents, and more

