



Strategic Segmentation

Make custom portfolio recommendations to advisors with AI-led Insights



Investment advisors (RIAs) influence end client’s decision making when it comes to investment choices. They control a significant value of portfolios and often seek advice from asset managers on portfolio recommendations. SLKs AI-led solution helps wholesale teams with fund management companies get precise insights into the RIA’s investment patterns and make a more precise pitch to improve conversions.



Investment segmentation clusters



Data curation and enrichment



Portfolio analysis and recommendation engine



NLP and image processing

Key benefits

- Completely automated process
- Standardized portfolio models for advisor segments
- Improved distribution efficiency using tailored strategies
- Improved lead conversion with self-improving AI engine

How it works

Improve collaboration and drive sales with SLK’s investment strategy segmentation

- Use AI/ML to discover patterns and apply cluster analysis to create investment segments/clusters
- Accelerate analysis and improve suggested product positioning with a portfolio recommender “Brain”
- Identify advisor investment pattern and make custom recommendations, enabling easier portfolio approval
- Classify prospects with investment patterns/segments for “look-alike” models
- Empower sales with insights for informed prospecting
- Create more bandwidth for the product team to focus on value-add analysis and add “personas” to identified segments

Get in touch! Write to us at hello@slkgroup.com for more details.



SLK takes an Intelligent automation first approach to achieving an enterprise’s central goals. Being a go-to technology & consulting firm for some of the Fortune 500 companies, we recognize the pace at which technology is transforming & its impact. With SLK’s deep understanding of the BFSI domain with serving our 20+ clients & giving them 32% CAGR over 5-years makes us the best partner in the sector.