Unlocking Banking Insights with Aible: What's Changed and Why Analysis

Executive Summary

Banks and asset managers operate in a fast-moving environment where market conditions, client behaviors, and portfolio performance shift constantly. Success depends on the ability to quickly understand how assets under management are changing, and why those changes are happening.

Aible automatically analyzes millions of patterns across KPIs such as total assets, product mix, client count, and regional performance, and prioritizes the most impactful, actionable insights. From portfolio managers to executives, banks can leverage these insights to proactively identify growth opportunities, mitigate risk, and make informed decisions at a speed and scale beyond traditional manual analysis.

The Challenge and Opportunity

Banks and asset managers face rapidly shifting environments where success depends on more than tracking headline metrics. Total assets, product performance, client counts, and regional balances fluctuate constantly, but the real opportunity lies in uncovering the underlying drivers behind those changes. Teams struggle with:

- Rapidly changing client behavior and investment patterns across regions and products
- Market shifts and competitive actions that impact asset growth and product mix
- External factors such as interest rates, market volatility, and regulatory changes
- Limited visibility into the drivers behind portfolio and KPI shifts in a timely, actionable way

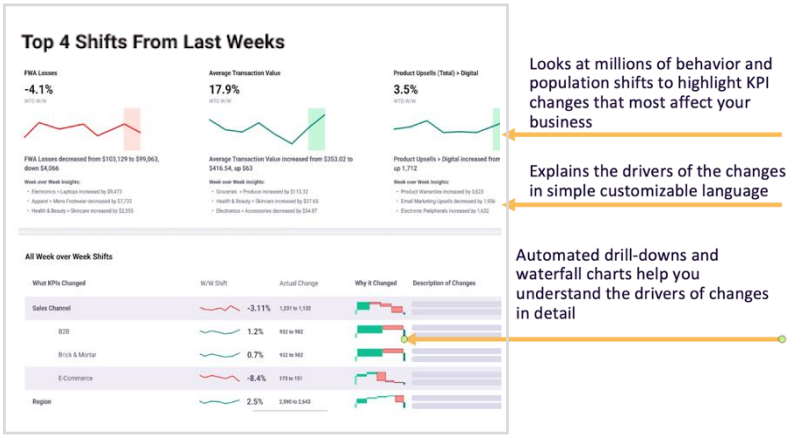
This gap often forces teams to react after trends emerge, rather than acting proactively—slowing growth, increasing risk, and reducing the effectiveness of investment strategies.

The Aible Solution for Banks and Asset Managers - What's Changed and Why

Instead of relying on slow, manual, or fragmented analytics, Aible leverages AI to power analysis at a humanly impossible pace and efficiency.

It evaluates **millions of patterns in the data to uncover the true drivers** of business impact.

It enables banking teams to rapidly identify the segments driving changes in their top KPIs, and enables them to drill down into the factors contributing to those changes through the "What's Changed and Why" analysis.

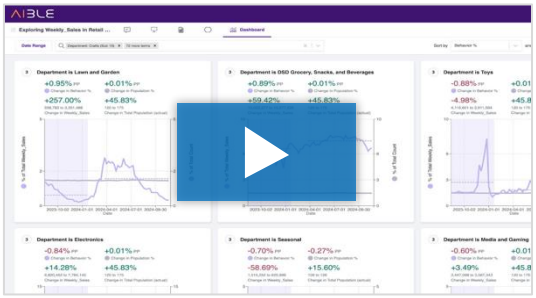


For example, Aible can analyze how product mix, regional trends, branch performance, and client behavior interact to influence total assets under management. It highlights not only which areas are growing or declining, but also why—allowing teams to understand key portfolio shifts and take timely, informed action with confidence.

Banking Asset Manager Example

In a demonstration using Aible's "What's Changed and Why" capabilities, a representative asset management team reviewed changes in total assets under management across regions, products, and client segments. In just minutes, Aible analyzed recent performance compared to the prior period, highlighting the most significant shifts and ranking them by impact.

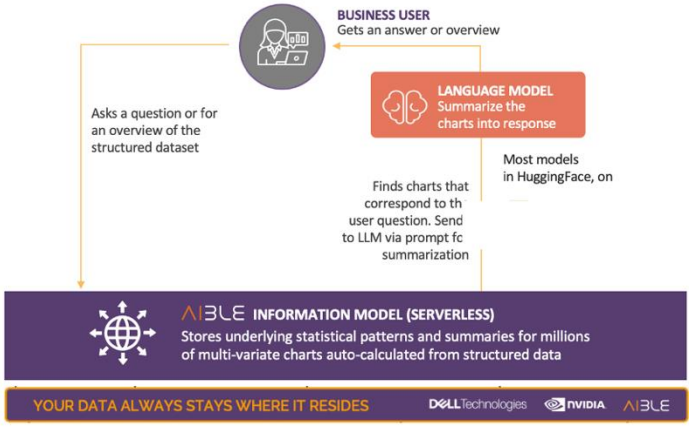
Demo Video:
aible.wistia.com/medias/ps78kqqgag



Given the expected shifts due to markets, client behavior, and other factors, bankers need a completely **automated system that can analyze their data in humanly-impossible detail** to detect what is changing in their business today - essentially an early warning situational awareness system. All analytics and predictive models are premised on the future being similar to the past. That assumption is no longer true. You can't assume you know the right questions to ask of your data - you need agentic AI to ask every possible question on your behalf and highlight what you need to know **today**. **Three of the ten largest enterprises already started using Aible for this capability since April 2nd 2025. Can you afford to not do the same?**

Aible keeps data and runs the models in customer's existing repositories, servers, desktops, or customer's own clouds.

Structured Data (80% by Value)



Fortune **500** Case Study
esented at AI4 Conference, Aug '25

Every business end-user including executives will be able to surface unknown actionable insights due to fundamental shifts in assets, client behavior, product performance across regions and segments - patterns that they had not discovered using traditional analytics and would not have found out about until after reporting period close - at which point it would be too late to take timely action.

Who this matters to

Portfolio & Investment Management	• Portfolio Manager • Product Manager • Investment Analyst
Client & Relationship Management	• Client Relationship Manager • Regional / Branch Manager
Operations & Risk Management	• Operations Manager • Risk Manager
Compliance & Legal Oversight	• Compliance Officer • Legal Counsel
Executive Leadership	• CFO / COO / CEO / Chief Investment Officer

Deployment

Aible is deployed directly on Dell products. Aible can analyze data in Snowflake, Big Query, Databricks, Redshift and others without moving or copying the data.