



Transform your wealth business into an intelligent enterprise that **engages, advises, and scales with precision**

The wealth management industry is entering a new phase of transformation driven by digital-native investors, increasing pressure on advisor productivity, and the growing role of data and AI in investment decision-making. To stay competitive, firms must rethink client engagement, unlock intelligence from fragmented data, and build scalable technology foundations for the future of advice.

Nagarro helps wealth management firms through advisory and AI-powered digital engineering.



Elevating Client Experience

- Hyper-personalized investor journeys
- Digital onboarding & client lifecycle automation
- AI-powered portfolio insights & recommendations



Building efficient and scalable operations

- Advisor productivity platforms
- Intelligent workflow automation
- AI-driven portfolio operations and reporting



Creating a Connected Wealth Ecosystem

- Open wealth platforms and API ecosystems
- Fintech integrations and partner orchestration
- Data platforms for AI-ready wealth management



Modernizing Core Platforms and Data Foundations

- Core platform modernization
- Cloud migration and scalable architecture
- Data foundations for advanced analytics and AI



Move fast in the areas that matter *most*

Client Experience

We help you design and deliver personalised client and RM journeys that drive retention and wallet share.

Operations

We identify and eliminate the manual, fragmented processes that inflate your cost-to-serve and slow your firm down.

Technology Core

We assess and strengthen your core systems for security, scalability, and regulatory readiness.

An example of a recent engagement

Defined a 3-Year Digital Strategy for a leading WAM player in GCC

Business-led. Client-centric. Execution-oriented



3-Year Strategic Roadmap: Across CX, Operations, Data, and Core Platforms sequenced for investment discipline and delivery feasibility.



Target Operating Model: Defined technology and governance structure to support the firm's growth ambition and regulatory obligations.



Full Capex-Opex Investment Plan: Granular project-level cost breakup enabling CFO-level investment clarity across a 3-year horizon

Why Nagarro

- Ex CIOs, bankers and wealth managers with AI-augmented product owners equipped with industry expertise
- A firm which is neither too big nor too small to stand by its promises which has grown through 20 acquisitions
- A team of engineers building proprietary agentic platforms with required guardrails for a strictly regulated industry

Let's get started

Book a 60-minute exploratory call by

writing to us at bubfsipractice@nagarro.com

About Nagarro

Nagarro is a global digital product engineering and consulting leader with a full-service offering. With customer experience at the core of our digital transformation strategies, we help enterprises deliver consistent communications via preferred channels specially within regulatory boundaries. Nagarro employs around 18,000 people in 39 countries.

For more info about us, visit: www.nagarro.com



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