

Investnet Tech Data Platform

Investnet Data & Analytics

Creating opportunities for decisive action by transforming disconnected data sets into useful analytics and next best actions.

The Data & Analytics platform architecture features flexible and modular components so you can deploy solutions that drive revenue and provide targeted services to your customers.

1. Data Connectivity

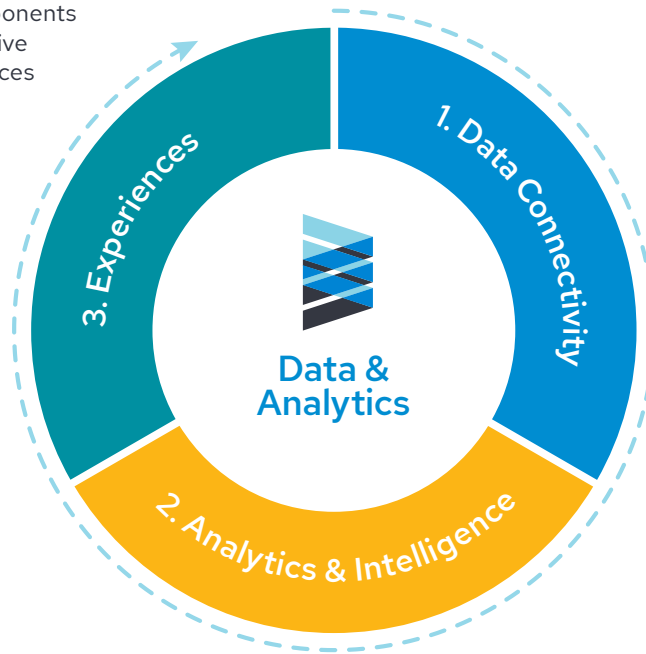
- Transactions and Investment Data
- Enrichment
- Ecosystem and Third-Party Data
- Account Linking

2. Analytics & Intelligence

- AI and Machine Learning
- Business Intelligence
- Goals Cashflow, and Payments
- Next Base Actions

3. Experiences

- Tools, APIs
- Insights
- Advisor
- Embedded Applications
- Enterprise User



5 Steps to turn data into intelligence.

STEP 1

Aggregation

Capture all of your valuable data

STEP 2

Enrichment

Enrich and categorize your data

STEP 3

Normalize

Normalize your data to increase its utility and performance

STEP 4

Analyze

Analyze data to identify patterns, trends and propensities

STEP 5

Execute

Surface insights and recommend actions

Investnet Tech Data Platform

The platform and partner for intelligent technology companies.

CONNECTIVITY		ANALYTICS & INTELLIGENCE		EXPERIENCE		ADVISOR	MARKETING
NORMIZATION		BUSINESS INTELLIGENCE		SHARED/EMBEDDED			
Normalization		Descriptive Analytics		Acct Linking	Transactions		
Modeling		Reporting & Dashboards		Wellness APIs	Verification	CLIENT	SERVICING
ENRICHMENT		INSIGHTS ENGINE		Embedded Investing	Forecasting		
Transaction Enrichment		Predictive Insights		Spending	Budgeting		
Investment Enrichment		Prescriptive/Next Best Answer		Savings Goals	Micro-Savings	EMPLOYEE	CREDIT RISK
AGGREGATION		VALUATION		Micro-Investing	Payment Tokenization		
Bank Data	Customer Data	Business Valuation		Developer Switch Kit	Insight APIs		
Custodial Data	3rd-Party Data	Individual/Net Worth Valuation		Reporting	Visualizations	FRAUD/AML	
Conversational AI							
DEVELOPER TOOLS OPEN API							

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