



Intelligent Financial Document Assistant for a Global Leasing & Finance Organisation

Overview

An international company specialising in financial leasing needed a way to streamline the review of intricate financial documents. With InfoVision's deployment of an AI-based solution for financial document analysis, efficient financial document processing and instant analysis were achieved through RAG (Retrieval Augmentation).

The Challenge: Manual Processing Slowing Financial Insights

The client relied heavily on manual analysis of complex financial documents, like reports and statements. The financial analysts spent a long time analysing the large amounts of data, which slowed their ability to derive useful insights.

Moreover, the company lacked sophisticated solutions for natural language understanding and efficient data interaction. It hampered the company's productivity and its ability to scale its operations to handle more data.



The Solution: GenAI-Powered Document Intelligence with RAG

InfoVision created an AI assistant for analysing financial documents. The platform enabled analysts to extract valuable insights by interacting with documents through conversational questions.

Using the Retrieval-Augmented Generation (RAG) framework, the tool provided intelligent document searching, summarisation, and calculation. The platform offered a UI that allowed users to view documents and engage in conversations, while storing conversation history for auditing purposes.

The platform ensured scalability issues would be avoided, as it could handle multiple document pipelines and tokenised models.

Tech Stack

- OpenAI GPT-4
- OpenAI Embeddings
- PostgreSQL
- LangChain
- PyMuPDF
- AWS S3
- FAISS
- React.js

Business Impact: Faster Insights, Reduced Manual Effort

Improvements achieved from implementation:

- Reduction in manual labour in the reading of quarterly and annual financial statements
- Real-time extraction of information for timely decision making
- Improved document analysis by 60-70% through indexed search capabilities
- Enhanced access for those who have less knowledge of finances through domain-specific prompts

Strategic Value: Scalable GenAI for Financial Intelligence

In addition to providing immediate benefits of efficiency, the solution generated additional value:

- **Scalability:** Capable of managing multiple forms of documents, such as regulatory and compliance reports
- **Financial insights:** Enabled teams to gain contextual and accurate financial insights
- **Efficiency:** Minimised the need for manual analysis
- **GenAI future-ready platform:** Provided an avenue for extending GenAI applications in BFSI sectors, such as risk analysis, compliance, and financial reports