DELL Technologies

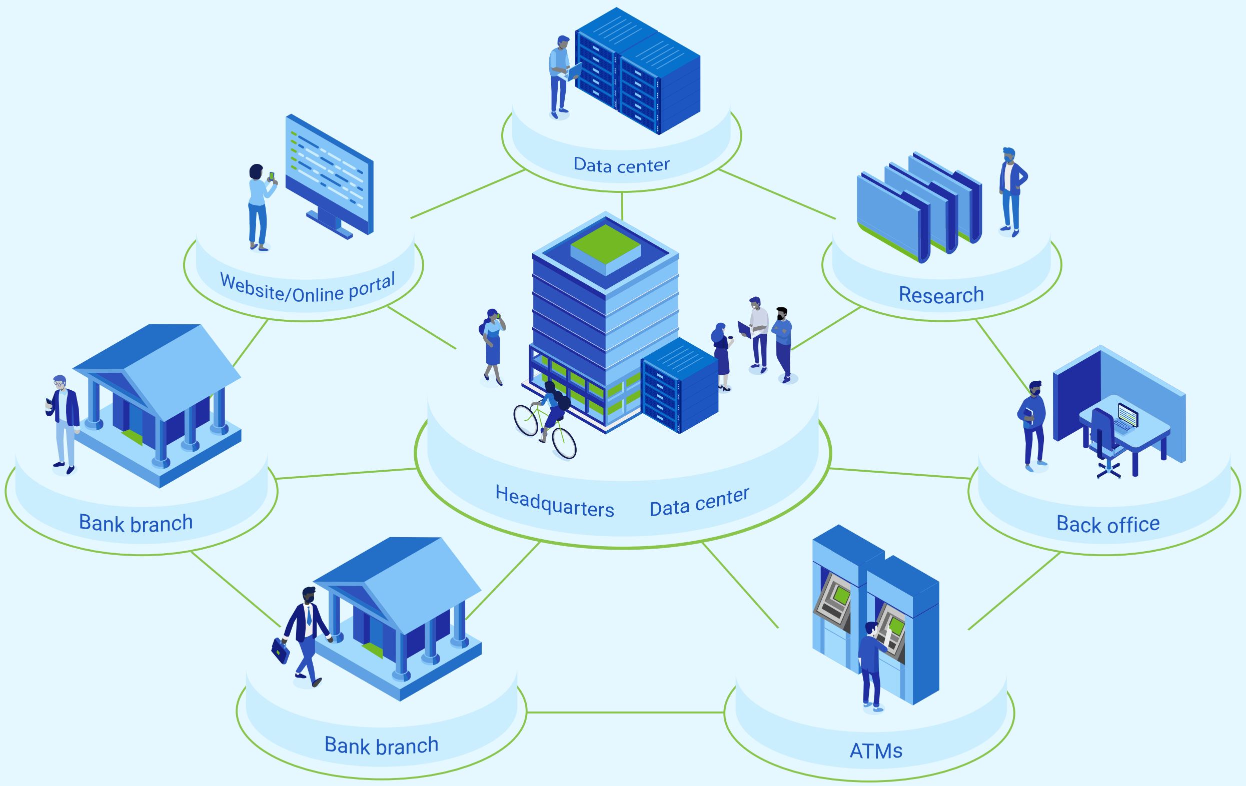
NVIDIA

The Transformative Power of Generative AI for Financial Services

A roadmap for exponential growth with Dell Technologies and NVIDIA

Get Started

Generative AI builds on the momentum of AI in financial services



Generative artificial intelligence (GenAI) is a game-changing technology that has tremendous potential for the financial services industry (FSI). Building on decades of AI, GenAI can transform customer interactions and revolutionize workplace efficiency. This cutting-edge technology also holds potential for refined risk profiling, fraud protection, strengthening cybersecurity and advancing algorithmic trading strategies.

- Transform customer interactions
- Improve efficiency and productivity
- Potential to reduce risk
- Amplify fraud protection and cybersecurity
- Optimize algorithmic trading

The evolution of AI for financial services

AI has long been a cornerstone in FSI, driving customer acquisition, enhancing efficiency and providing valuable insights. GenAI provides FSI with a unique opportunity to improve competitive posture through innovation, differentiation and expanded services in a way that has never before been possible.

Customer experiences:
Improve chatbot understanding and conversation, enable natural interactions and facilitate complex customer queries.

Efficiency and productivity:
Reduce the need for manual tasks, facilitate decision-making and humanize machine interactions via voice commands, chatbots and digital assistants.

Risk profiling:
Simulate and analyze risk scenarios to uncover hidden patterns that may not be apparent with traditional AI. Enable real-time monitoring and assessment of risk profiles.

Fraud protection and cybersecurity:
Identify subtle patterns and anomalies in transaction data and user behavior patterns.

Optimized algorithmic trading:
Historically, algorithmic trading relied on AI, but GenAI allows existing machine learning algorithms to be optimized for better results, identifying trends such as economic indicators, customer sentiment and current events — and adapting trading strategies in real time.

With so many rich areas of improvement to explore, how do FSI leaders recognize the right use cases and lead adoption to maintain a competitive edge?

Integrating AI and GenAI for FSI leaders

Understanding and leveraging the strategic implications of GenAI is crucial for business transformation. Successfully integrating GenAI into your operations involves more than just investing in the right technologies; it also requires fostering a culture of innovation and continuous improvement. Addressing data sovereignty is a key part of this integration, ensuring your data remains secure and compliant with local regulations while embracing advanced AI solutions.

While FSI organizations tend to be cautious about adopting bleeding-edge technologies like GenAI due to potential security and governance risks, investing in GenAI now can provide significant advantages. Early adopters gain a competitive edge by offering innovative services, enhancing operational efficiency, establishing themselves as forward-thinking market leaders and continuously optimizing operations using real-time data analysis. Investing in the technology today will provide significant advantage.

Building GenAI capabilities requires a comprehensive strategy. Start by identifying key areas and use cases with the most significant impact, then develop a clear roadmap for implementation. Invest in the right infrastructure, hire or upskill employees and ensure robust data practices. Partnering with experienced experts can help navigate challenges like hallucinations and bias, ensuring successful integration and positioning your organization for long-term success.

Your data, your tools — your differentiator

Protecting your data and intellectual property by creating differentiated applications in-house is the key to your competitive ability. You need AI and GenAI solutions that empower you to harness your own data and custom toolsets, transforming your business for the AI era.

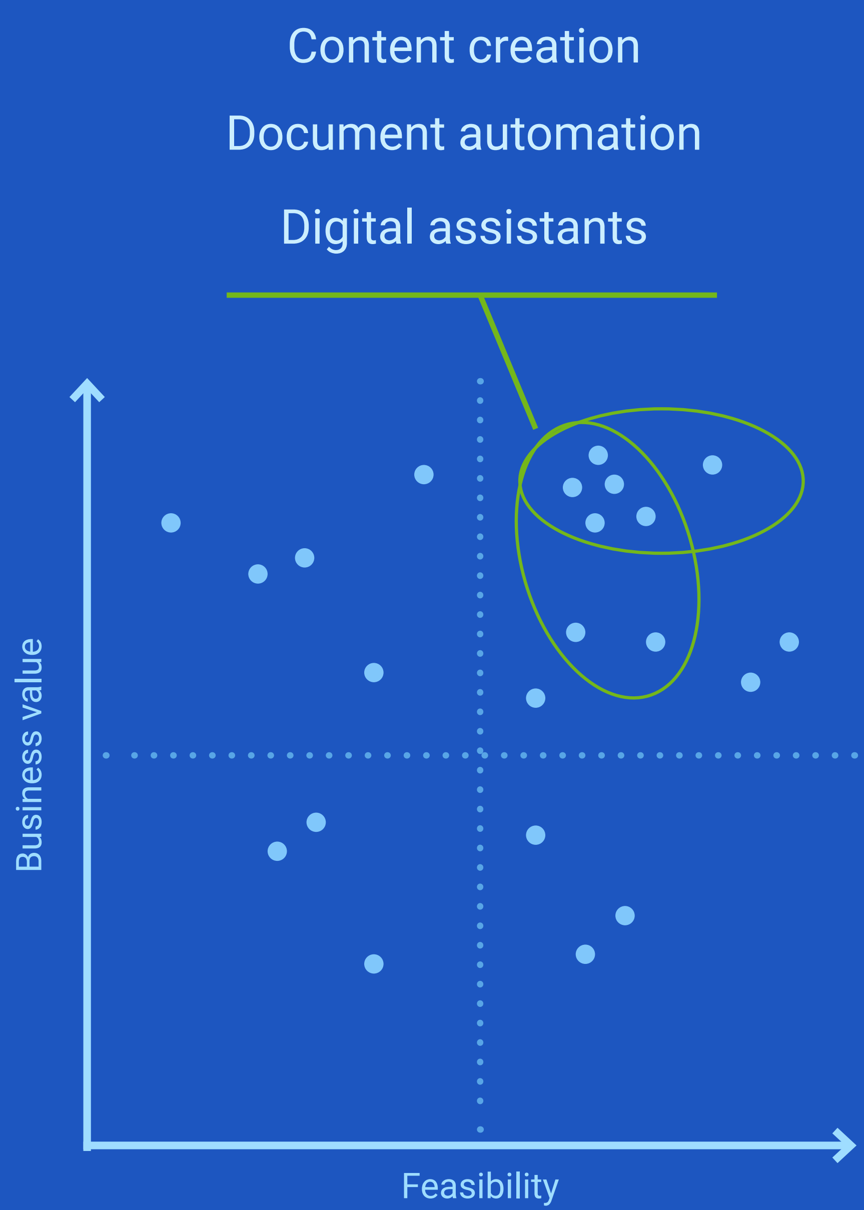
Identifying use cases

Identifying the right GenAI use cases starts by focusing on opportunities that offer both high business value and high feasibility.

When determining **business value**, consider both immediate cost savings and long-term benefits, such as improved efficiency, enhanced customer experiences and competitive differentiation.

Feasibility assessment involves evaluating your organization's readiness for AI initiatives, including infrastructure, data quality, process compatibility and available expertise or partnerships.

This exercise will help you identify specific use cases where AI can deliver substantial benefits and lead to **use case clusters** that align to leverage people, process and infrastructure. While opportunities for differentiation vary greatly, there are a few use case workflows that repeatedly rise to the top. These are content generation, document automation and digital assistants.



Use case: Content creation

GenAI creates original content across various media — text, images, audio and video. For FSI, this can enable the efficient production of highly personalized and engaging content at scale. The result is enhanced customer experiences and streamlined workflows throughout the organization.

Transform customer interactions

By tailoring content to individual preferences at massive scale and in near real time, this technology strengthens brand connections while maintaining consistent, reliable messaging across all communications. Combined with predictive analytics capabilities, organizations can proactively meet customer expectations and deliver targeted content, fostering loyalty and satisfaction.

Improve efficiency and productivity

In addition to the marketing applications described above, GenAI empowers various teams within your organization to complete tasks more efficiently.

- Financial managers can craft customized proposals that cater to individual preferences and behaviors, enhancing client engagement and satisfaction.
- HR teams can generate more relevant and timely content for the workforce by transforming information into predefined templates, fostering better internal communication.
- Business and IT teams can summarize and prioritize operational data, delivering highly efficient and tailored content to stakeholders.

Use case: Document automation

GenAI streamlines document creation, management and processing by automating data entry, extraction and analysis. Through pattern recognition across large swaths of documentation you can improve efficiency, gain insights that were previously unattainable and contribute to more accurate risk assessment.

Improve efficiency and productivity

Streamline operations by automating time-consuming tasks, such as data entry and document analysis. By minimizing human errors, GenAI improves data accuracy and reduces the need for error correction. Document automation also enhances efficiency through seamless collaboration workflows, ensuring documents move smoothly through predetermined processes. Plus, GenAI can scale to maintain high productivity levels even with increased document volume.

Gain customer insight

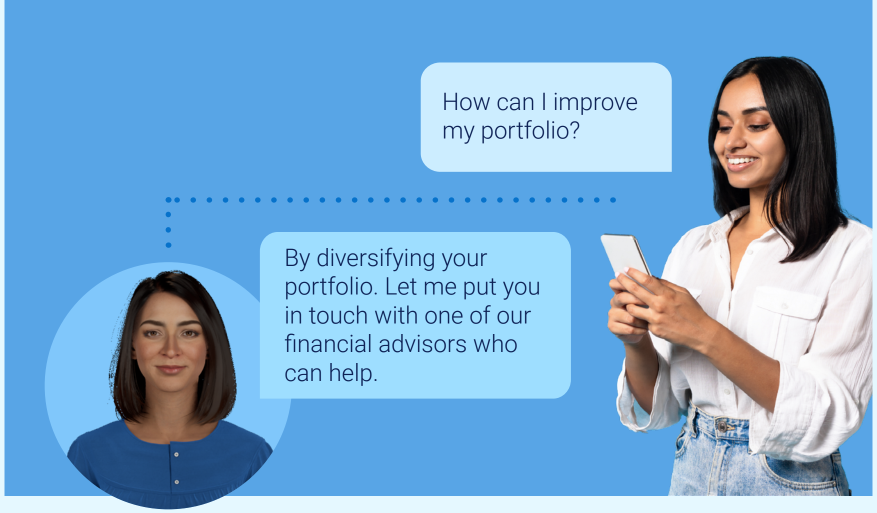
Better understand customer behavior to optimize functions, programs and initiatives by streamlining data collection and extraction from various financial documents. Summarizing accurate and up-to-date customer information enables better and faster decision-making for tasks like loan applications and credit approval as well as reducing the possibility of fraud. Additionally, GenAI's ability to gather and analyze historical data facilitates backtesting, enabling FSI to refine their strategies and optimize performance.

Reduce risk

Improve risk profiling capabilities by automating data extraction from various financial documents, such as credit reports and transaction records. Advanced data analysis identifies patterns, trends and potential risk indicators, enhancing the accuracy and efficiency of risk assessments. Consistent data processing minimizes human errors and inconsistencies for more reliable risk profiling. And accelerated decision-making allows organizations to address risk-sensitive transactions promptly.

Use case: Digital assistants

Intelligent, conversational interfaces that provide personalized, human-like interactions, delivering context-aware information in a highly intuitive and efficient manner. Digital assistants can enhance customer interactions and improve workplace efficiency.



Transform customer interaction

Transform customer interactions with 24/7 availability and personalized, seamless experiences in person and virtually. Using natural language, digital assistants understand customer preferences and history, providing tailored assistance and timely solutions that boost satisfaction and engagement, fostering loyalty and satisfaction.

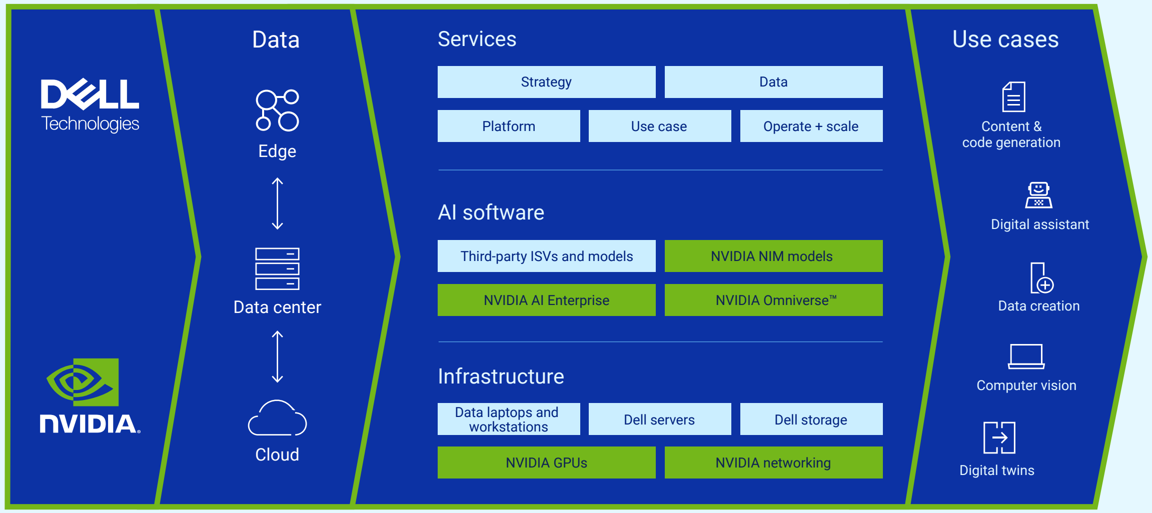
Enhance branch offices

Digital assistants in branch offices offer a streamlined and efficient solution for organizations under pressure to reduce expenses. These AI-driven tools can identify customers and access their profiles, including Know Your Customer (KYC) data, allowing for a personalized and consistent experience without the need for additional headcount.

Employee training

Organizations can personalize training by using digital assistants to create interactive learning experiences, such as selling scenarios tailored to different audiences.

Infrastructure and solutions for AI success



Transform innovation into value with the Dell AI Factory with NVIDIA

Simplified

Simplify and scale AI deployments and operations to production, with workflow automation for fast time to value.

Tailored

Transform your data into insights that scale across your organization, with leading capabilities uniquely aligned to your objectives.

Trusted

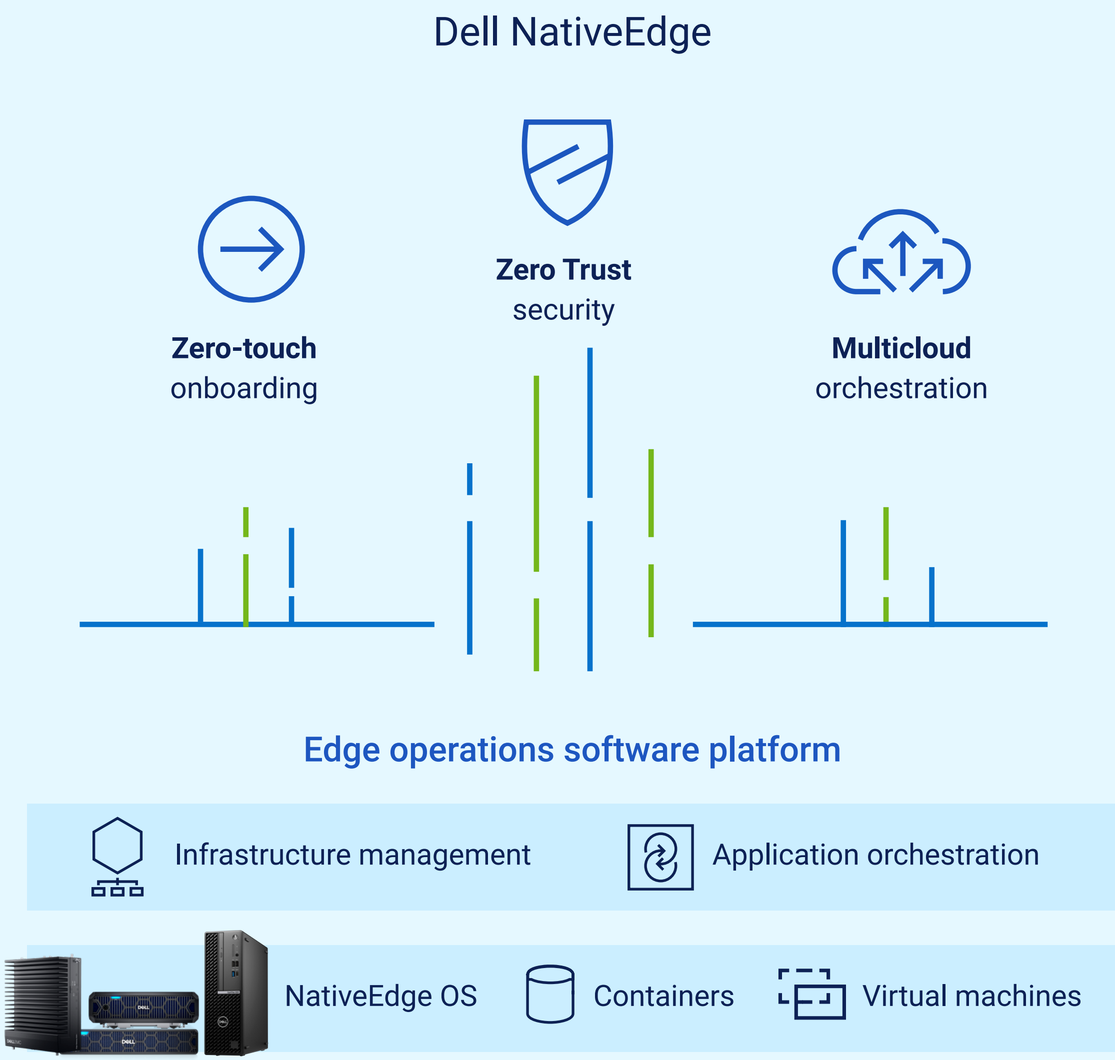
Implement a secure data workflow from source to outcome, ensuring data privacy, governance and full control of your data.

Deploying infrastructure for any new IT initiative requires a number of decisions. For FSI in particular, choosing on-premises infrastructure offers several key benefits, including enhanced data security, superior performance and greater control over sensitive information. These advantages are critical to support diverse AI use cases with a strong foundation for future growth and success.

Dell AI Factory with NVIDIA® addresses these needs with an end-to-end AI solution that integrates leading Dell compute, storage and networking capabilities with NVIDIA's advanced AI infrastructure and software. This combination helps you more easily manage, prepare and secure critical data while achieving the high performance required by AI and GenAI applications.

Dell AI Factory with NVIDIA simplifies deployment and supports the entire GenAI lifecycle, utilizing techniques like retrieval-augmented generation (RAG), as well as providing comprehensive solutions for inferencing, model tuning and development. This solution is built to handle diverse deployment scenarios, including core data centers, edge environments and cloud, providing the flexibility to adapt as needed. By leveraging the comprehensive Dell professional services and pay-as-you-go Dell APEX subscriptions, you can accelerate your GenAI journey with tailored support and scalable solutions.

Accelerate AI innovation at the Edge



Whether it's self-service transactions at ATMs, transaction alerts on mobile apps or data streaming from global markets, the edge is where modern financial decisions are born. With edge computing, this data doesn't need to be transferred to a centralized location for processing — AI inferencing at the edge enables data to be analyzed and acted upon where it originates. This results in reduced latency, faster insights and improved security.

As data is generated at the edge, Dell NativeEdge brings the power of Dell AI Factory to the edge by securely scaling infrastructure and orchestrating AI applications throughout any location, with seamless support across virtualized and containerized environments. NativeEdge Blueprints automate the deployment of financial services frameworks and AI applications, enabling faster and more efficient AI innovations.

Benefits include:

Less than

1 minute

to deploy infrastructure and applications[1]

Up to

68%

time savings by automating edge application orchestration[1]

[1] Enterprise Strategy Group by Tech Target, technical validation commissioned by Dell Technologies, Dell NativeEdge – Operations Software Platform, February 2025.

Building proprietary AI solutions for competitive advantage

Many organizations rely on cloud-based Software-as-a-Service (SaaS) solutions for AI and GenAI, which can lead to homogeneous results across the industry. To gain competitive advantage, they need innovative approaches to create a competitive edge in an industry where differentiation is key to success.

Investing in proprietary, on-premises AI and GenAI solutions is crucial to build and maintain a competitive edge in the fast-paced, data-driven and security-conscious financial landscape. Building in-house AI solutions cultivates intellectual property and expertise and fosters innovation and differentiation that drives long-term growth. These investments provide numerous long-term benefits, including enhanced data security, customization, cost savings, independence and talent development opportunities.

With Dell AI Factory with NVIDIA as a base, organizations can create tailored, on-premises solutions that are truly unique, helping you stay ahead of emerging trends and better serve customers. You can combine and build on GenAI capabilities to create applications that transform customer interactions, improve efficiency and productivity, refine risk profiling, amplify fraud protection, optimize algorithmic trading and much more.

The transformative power of AI and GenAI is undeniable

Investing in AI and GenAI empowers FSI organizations to build a unique competitive edge, positioning themselves as industry leaders in the digital era. Augmenting existing AI solutions with GenAI fuels growth, innovation and competitiveness, ultimately delivering enhanced value to customers and stakeholders. By harnessing these cutting-edge solutions, your organization can ensure long-term success amidst the constantly evolving financial landscape.

Learn More

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DELL Technologies AI Factory WITH NVIDIA

Dell Technologies and NVIDIA

Dell Technologies and NVIDIA have a long-standing partnership with over 25 years of joint innovation focused on accelerating innovation and delivering cutting-edge platforms, solutions and software that enable transformative results for our joint customers. Our ongoing partnership showcases our commitment to innovation and demonstrates our ability to adapt to the evolving technological landscape.