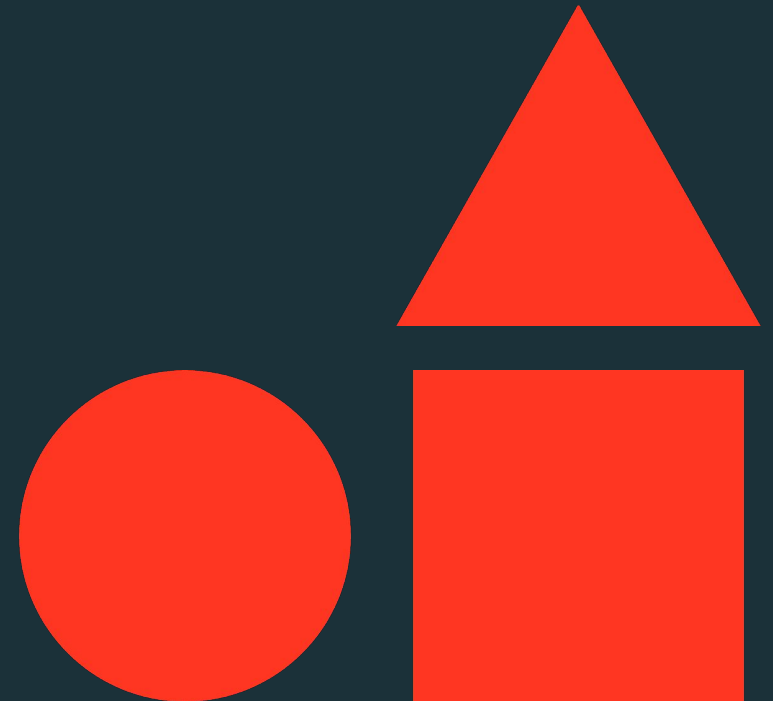




Data Intelligence Platform

Financial Services





databricks

The data and AI company



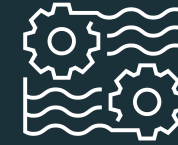
20,000+
global customers



\$134B+
recent valuation



4.8B+
run rate revenue



Inventor of the
lakehouse
and pioneer of
generative AI



Analyst-recognized leader

Gartner MQ Data Science and Machine Learning Platforms
Forrester Wave for Data Management for Analytics
IDC MarketScape for Analytic Stream Processing Software
ISG Agentic and Generative AI Buyers Guide



Creator of:



1500+

FSI clients

250

ISV and SI partners

500+

Data listings on marketplace

Goldman Sachs

STATE STREET

block



HSBC

BARCLAYS



databricks

Financial Services

intuit

bradesco



nab

experian

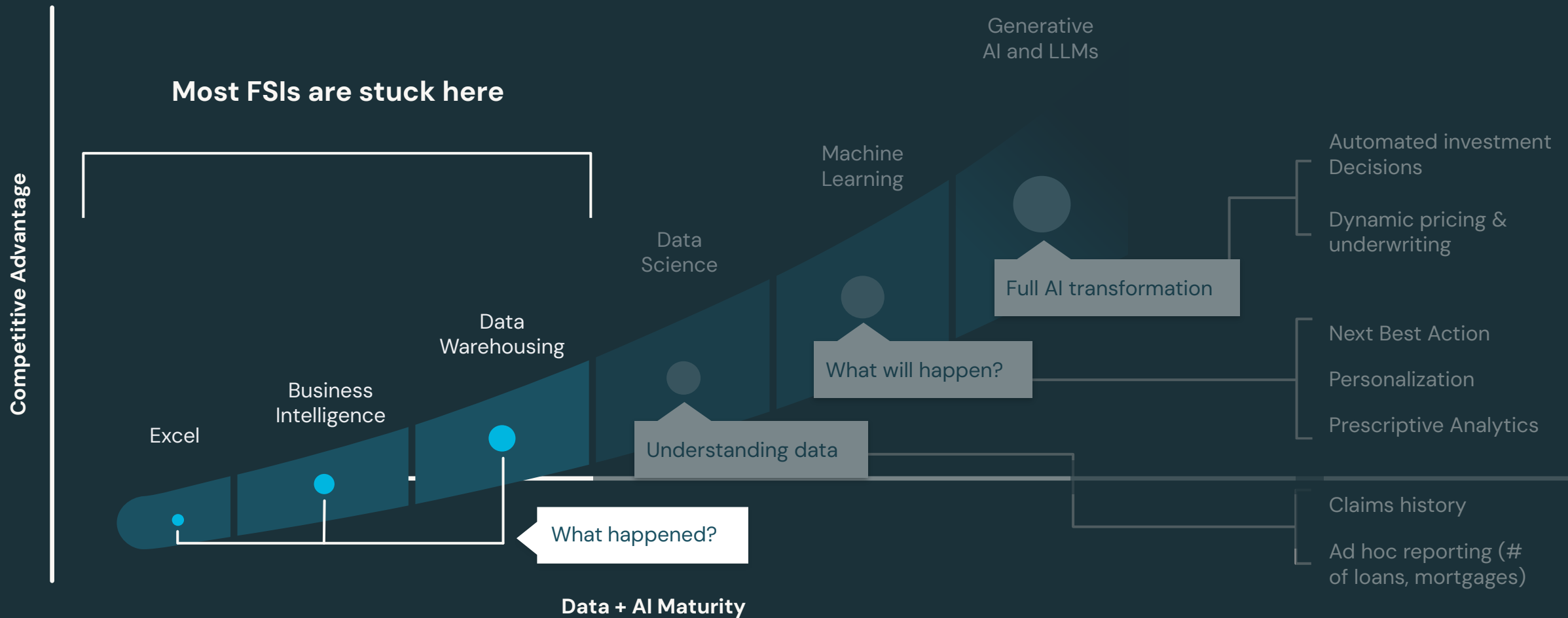
Allianz DIRECT



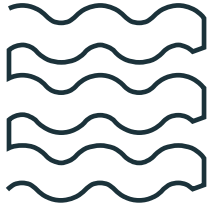
**The winners in every industry will be
data + AI companies**



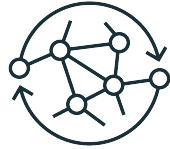
Data and AI maturity curve



Data Lake



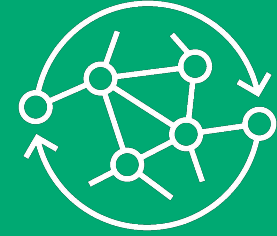
Machine Learning



Streaming



AI + AI Agents



Data Science

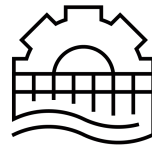


Most organizations struggle to realize this vision

Governance



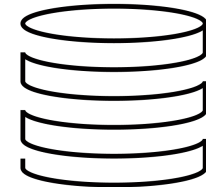
Orchestration & ETL



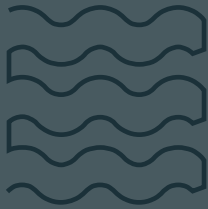
BI



Data Warehouse



Data Lake



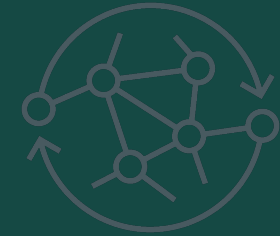
Machine Learning



Streaming



AI + AI Agents



**Data and AI
are siloed**

**Data privacy
& control are
challenged**

**Dependent on highly
technical staff**

Data S



Governance



Orchestration
& ETL



BI



Warehouse



Data Intelligence

DATA

Data democratized
through AI



AI

AI democratized
through your data



Composable Agents

Unified Governance

Open Formats



Composable Agents

Unified Governance

 DELTA LAKE **ICEBERG**  Postgres



Composable Agents

 Unity Catalog

 DELTA LAKE ICEBERG  Postgres



 **Agent Bricks**
Agentic AI & Machine Learning **Unity Catalog** **DELTA LAKE** **ICEBERG**  **Postgres**



Lakeflow
Ingest, ETL, streaming



Agent Bricks
Agentic AI & Machine Learning



Unity Catalog



DELTA LAKE

ICEBERG



Postgres





Lakeflow
Ingest, ETL, streaming



DBSQL
Data warehousing



Agent Bricks
Agentic AI & Machine Learning



Unity Catalog



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ICEBERG



Postgres





Lakeflow
Ingest, ETL, streaming



DBSQL
Data warehousing



Lakebase
Serverless Postgres



Agent Bricks
Agentic AI & Machine Learning



Unity Catalog





DELTA LAKE

ICEBERG



Postgres



 **Custom Apps**
Secure data and AI apps **AI/BI**
Agentic business intelligence

And more...

 **Lakeflow**
Ingest, ETL, streaming **DBSQL**
Data warehousing **Lakebase**
Serverless Postgres **Agent Bricks**
Agentic AI & Machine Learning **Unity Catalog** **DELTA LAKE** **ICEBERG**  **Postgres**

Every financial services firm benefits from AI



Banking & Payments

Personalized Offers for Cross-sell / Up-sell

Financial Crime Detection & Remediation for decreasing loss ratios

Financial Projections & Reporting to Improve Efficiency Ratios



Capital Markets

Market Intelligence for Alpha Generation

AI for Detecting Market Abuse and Surveillance

Broker Decision Support to Optimize Premiums

Operational Dashboarding for office of the CFO



FRANKLIN TEMPLETON



Insurance

Hyper-Personalized Insurance to Improve Retention Rate

Smart Underwriting for Triage Reporting

AI for Churn Prediction

Anomaly Detection to Prevent Fraud



Consulting & Auditing

RFP Response and Pricing Automation

Workforce Telemetry and Utilization Insights

Smart Project-Skill Matching

Capacity Planning and Forecasting



CliftonLarsonAllen



Key takeaways

1

Data Intelligence
Transforms FSIs

2

Industry Trends
Demand Action

3

Real Results,
Real Impact

