

Financial Services Data Intelligence: From Financial Services Data to AI-Assisted Decisions



More data should mean faster answers. FSDI makes it actionable.

Financial institutions have more data, but critical information can remain fragmented across finance, treasury, profitability, risk, customer, and operational systems. The challenge is not simply having data or dashboards; it is giving decision-makers trusted financial-services context so they can quickly understand what changed, why it changed, and where to focus.

Oracle Financial Services Data Intelligence (FSDI) combines financial-services-specific Analytics Ready Data Models, prebuilt Customer and Treasury Analytics, and AI-assisted capabilities in an OCI-native foundation. It turns curated data and analytical outputs into business-contextual intelligence that users can explore and act on.

How AI Changes the Experience

FSDI gives AI financial-services context through curated, business-oriented Analytics Ready Data Models so users can go beyond predefined reports and dashboards.

AI Assistant enables natural-language interaction with analytical data, helping users investigate profitability drivers, customer or segment performance, liquidity, funding, and other business questions.

Auto Insights surfaces relevant trends, patterns, relationships, anomalies, and business drivers so users can focus on material changes and investigate what may be driving them.

Together, these capabilities help users move from what happened, to why it happened, to where further attention may be needed — with less dependence on manual reporting cycles.

AI Applied to Financial-Services Business Priorities

Customer Analytics + AI

Investigate profitability and performance across customers, products, segments, geographies, and counterparties. Use AI-assisted exploration to understand profitability drivers, concentration, engagement, acquisition, retention, and portfolio performance.

Treasury Analytics + AI

Investigate liquidity, funding, interest-rate sensitivity, cash-flow behavior, and balance-sheet dynamics. Use AI-assisted exploration to identify patterns, exposures, and performance drivers and support more informed treasury decisions.

From Financial Services Data to AI-Enabled Decisions

Purpose-built analytics and AI for financial-services decision support

The Financial Services Data Landscape

Fragmented Information

Finance, treasury, customer, risk and operational data can't sit across multiple data systems.

Reporting dependency

Business questions can depend on preparation specialized reporting and lengthy analysis cycles.

Decision complexity

Teams need to understand what is changing, what is driving it and where further attention may be needed.

Modernization priorities

Institutions want modern analytics while continuing to make use of existing data and analytical investments.

How the AI-Enabled Analytics Experience Comes Together

Curated data

Oracle Financial Services and third-party data.



Business Context

Analytics Ready Data Models.

Semantics models and use cases.



AI-Assisted Insight

AI Assistant for natural-language exploration.

Auto Insights for trends, patterns and anomalies.



Decision Support

Customer profitability and performance.

Liquidity, funding and balance-sheet insight.

FOUNDATIONS FOR FUTURE AGENTIC AI

Analytics Ready Data Models organize curated financial-services data around business outcomes. This business-contextual foundation is designed to support future AI agents that can analyze context, generate insights and support decision-making.

TODAY AI Assistant + Auto Insights → **FUTURE** Agent-enabled decision support

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Prebuilt Customer and Treasury Analytics use cases

Why FSDI is Different

AI is only useful when it has the right business context. FSDI provides that context through financial-services-specific ARDMs, prebuilt semantics, KPIs, and packaged analytics. AI Assistant and Auto Insights then make that foundation easier to explore and turn into decision-ready insight.

- Financial-services-specific ARDMs organized around business outcomes
- AI Assistant and Auto Insights grounded in curated analytical data
- Customer Analytics and Treasury Analytics designed around priority financial decisions
- Flexible onboarding from existing Oracle Financial Services and third-party data and analytical outputs
- Incremental modernization path to OCI-native analytics that extends existing technology investments

From data to decisions — and from decisions to future AI experiences

FSDI organizes curated financial-services data around business context and analytical outcomes. Analytics Ready Data Models provide the governed foundation for AI-assisted exploration, while AI Assistant and Auto Insights help users investigate questions, identify drivers, and discover relevant insights. This creates a foundation for today's AI-assisted analytics and future Agentic AI scenarios.