



Scaling Investment Fund Guidance with AI

What if you could serve more investors by making complex fund information easier to access, without relying on an advisor for every query?

A regional financial institution wanted to simplify how investment fund information was accessed and analyzed. Bluetab implemented an AI solution that structures regulatory and technical documentation, enabling complex queries and instant visualizations. The result: **a slow, manual process became a fast, automated experience.**



Business Outcomes



OPERATIONS

- Processes 7 document types for each investment fund.
- Supports complex analytical queries using the institution's own information.
- Reused proven technical patterns to deploy and adapt the solution in just 2 weeks.



EFFICIENCY

- Transforms unstructured information into structured knowledge, enabling precise queries and instant visualizations.
- Provides public access to technical fund information without requiring authentication.
- Delivers clear, direct answers to frequent queries, reducing reliance on specialized advisors.



BUSINESS

- Potential to scale across 630 funds in the Mexican market, representing 4,410 knowledge documents available for consultation.
- Creates a path to serve smaller-ticket investor segments that have historically been uneconomical to support with dedicated advisors.
- Differentiates through deployment speed, technical robustness, and regulatory compliance.



Client Profile

A regional financial institution with its own investment fund offering, looking to expand its market reach and serve investor segments that do not currently receive personalized advisory support.



Situation

- Extensive, regulated **documentation that is complex to interpret.**
- **Difficulty explaining financial products** to non-expert customers.
- **Limited capacity among human advisors** due to mandatory licensing requirements.
- **Need to increase sales of proprietary funds,** reach underserved segments, and expand the customer base, including smaller investors for whom assigning a dedicated advisor is not economically viable.



Challenges

OPERATIONAL

- **Managing information at scale:** 7 documents per fund across hundreds of funds in the market.
- **Reliance on specialized advisors to answer complex queries.**

REGULATORY

- **Risk associated with AI-generated financial recommendations** in a regulatory environment where the legal framework is still evolving.

ECONOMIC / BUSINESS

- **Competition from multiple players** in the investment fund market.
- **Difficulty scaling service to customers** with smaller investment amounts.



Implementation Time

2 WEEKS



Solution

Bluetab developed an **AI-powered knowledge engine that transforms unstructured documentation into information that can be searched, queried, and visualized.** Built on cloud infrastructure, the solution uses a validated, reusable GenAI pattern that can be adapted across industries, accelerating deployment and enabling rapid customization for the financial-services context. **The implementation included data extraction, information structuring, pipeline configuration, language-model testing, and a custom frontend aligned with the institution's guidelines.**

KEY COMPONENTS

- Reusable **knowledge engine** adaptable across multiple industries.
- **Ingestion and structuring of regulatory and financial documents.**
- Access controls and **masking of sensitive data.**
- **Authenticated web frontend** with light and dark modes and language selection.
- **Language-model testing to optimize cost,** token usage, and language performance.

NEXT STEPS

- Identify **potential customer requirements and new AI-enabled business opportunities.**
- **Develop and deploy additional reusable cloud-based proofs of concept.**
- Manage **sensitive data through role and permission matrices.**

READY TO TURN YOUR NEXT CHALLENGE INTO A SUCCESS STORY? LET'S TALK.

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