

Qualytics

Getting AI-Ready in Financial Services by 2026: Why Data Quality Is the Hard Part

Derivative
uses of data
(AI / BI) **are**
exploding.



Marc Benioff ✓
@Benioff

AI's true gold isn't in the UI or model—they're both commodities. What breathes life into AI is the data & metadata that describes the data to the model—just like oxygen for us. The future's fortune lies in our data. Yes, Data is the new gold! ❤️



Data Quality is **everyone's responsibility.**

AI/BI success hinges on **Data Quality.**

73%

of executives are **unhappy** with their data quality

48%

of executives admit to having made **bad decisions** based on bad data in the last 6 mos*

**that they know of*

83%

of enterprises now have **CDOs****

***compared to 12% in 2012*

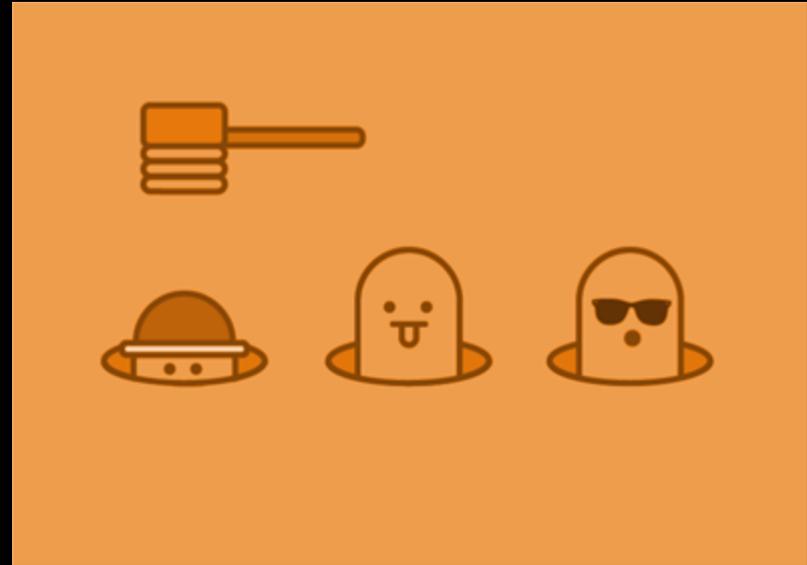
CDOs

are prioritizing support for derivative uses now: **Security, Discovery, & Quality**



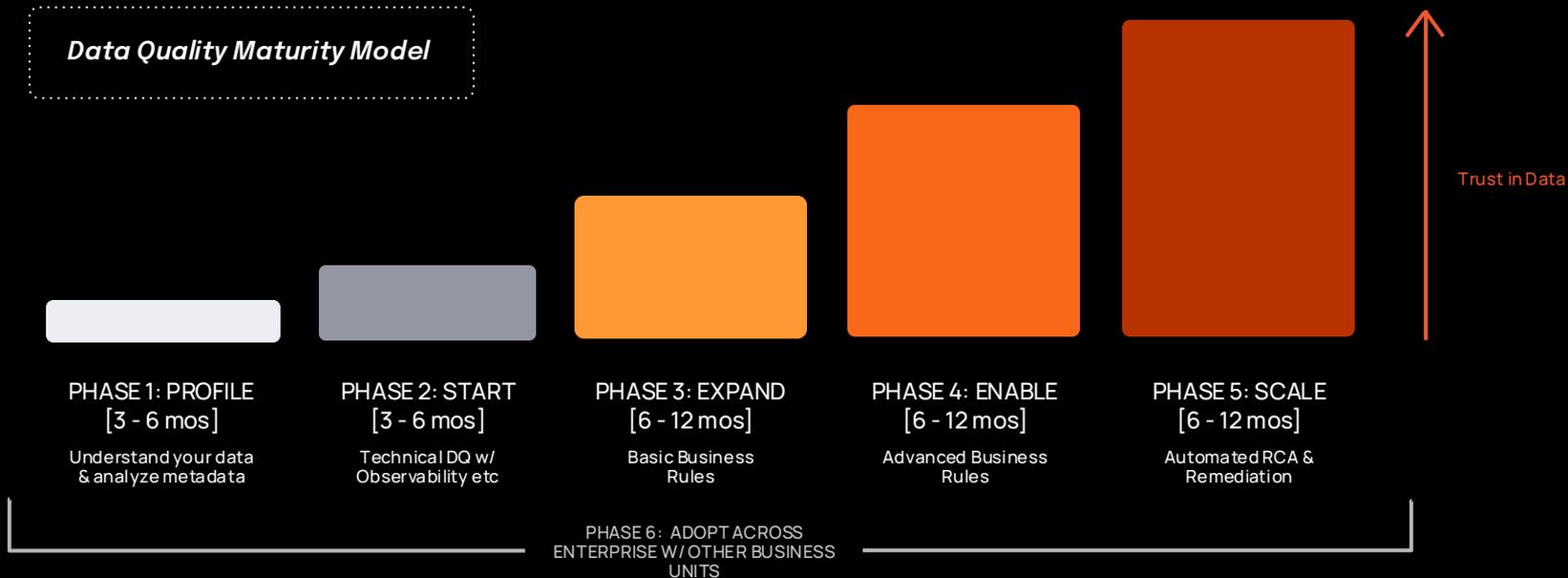
Enterprise DQ initiatives take a minimum of **2 years** and **7 figure investment** to implement.

Traditional approaches rarely get to **business maturity** because they are non-systematic, reactive, manual and error-prone.

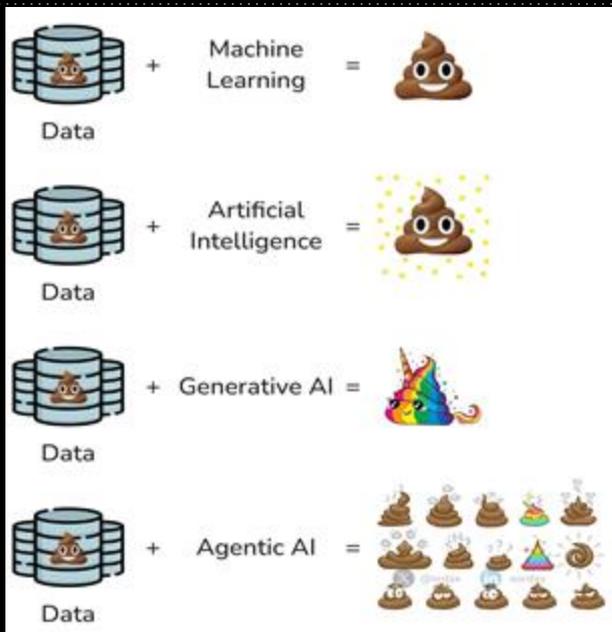


Why?

Data Quality Maturity Model



AI is adding serious fuel to the fire.



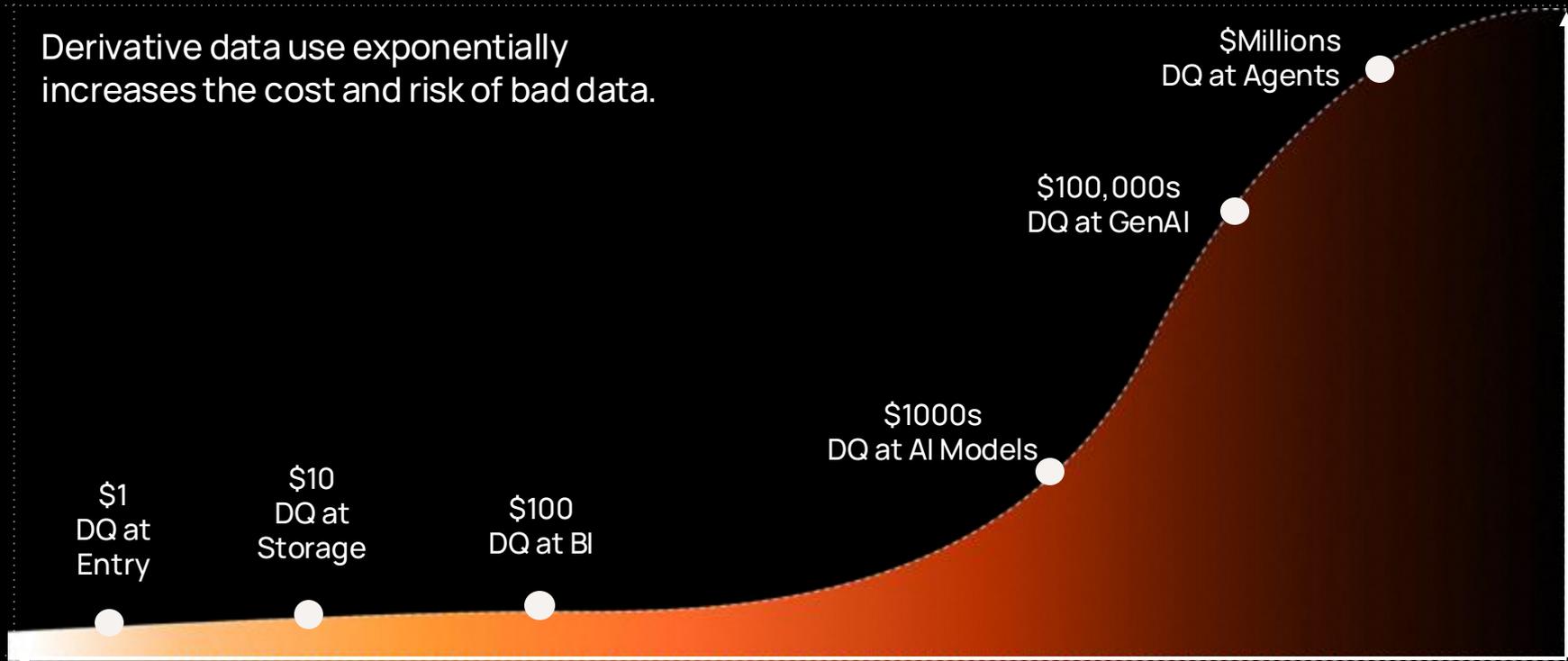
Source: Eduardo Ordax, AWS

In the pre-AI Era,
bad data cost the
average enterprise
\$15M/YR.

In the age of AI, that
figure is **at least**
HUNDRED-FOLD.

AI success hinges on **data quality**.

Derivative data use exponentially increases the cost and risk of bad data.



Qualytics reduces enterprise adoption of DQ to
6 months or less and a fraction of the cost.



Qalytics delivers **enterprise data quality** at scale.

■ Proactive

95% of rule management automated through ML & AI

■ Deeper Anomaly Detection

ML models run on raw data and check across tables and datastores

■ Simple No-Code UI

Allows easy collaboration between technical & business teams

■ Faster Remediation

Delivers the exact rows where anomalies were found and powers remediation workflows

Trusted by **Global Enterprises**

Brookfield

Revantage
A BLACKSTONE COMPANY

 norstella

WELLS
FARGO

aes

PERMIRA

 OCTUS

 Wellstar
HEALTH SYSTEM

 GP Georgia-Pacific

 mapfre
Insurance*

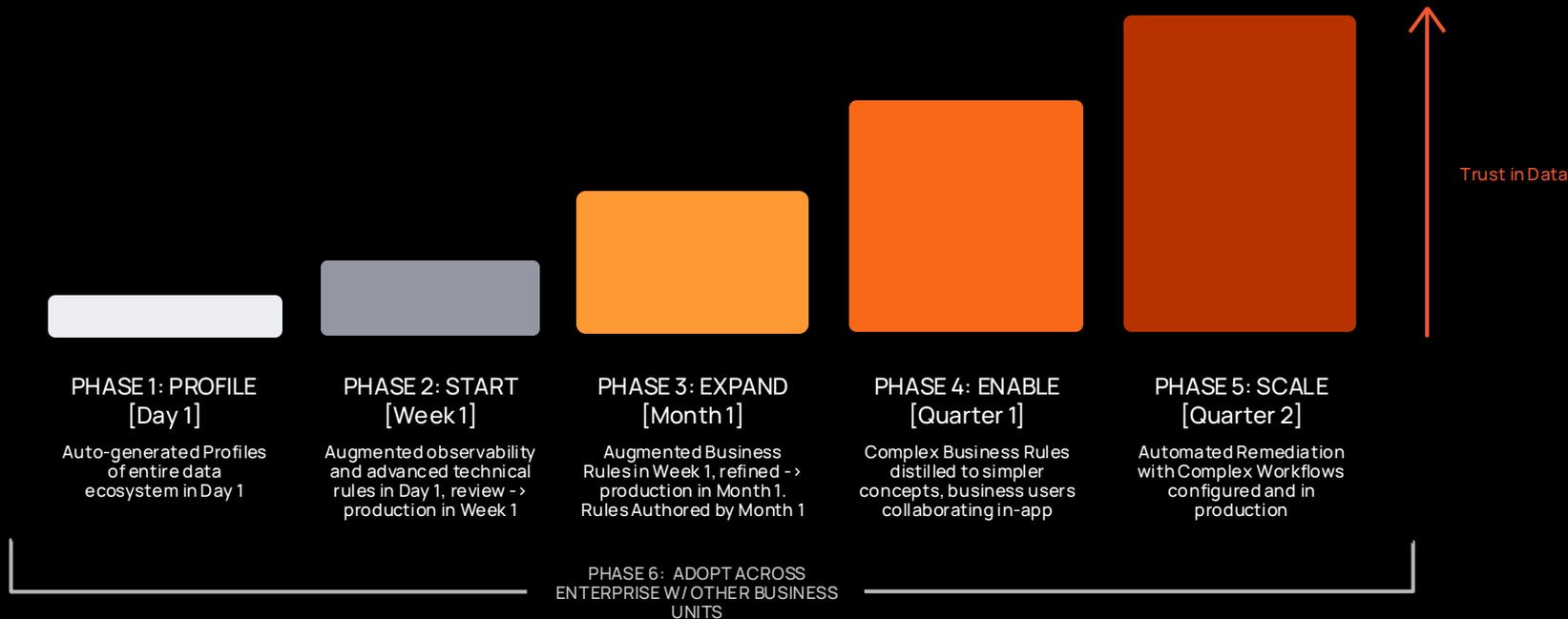
 cherre*



Our 4-step process to Data Confidence



Qualytics reduces enterprise adoption of DQ to 6 months or less and a fraction of the cost.



Customer Stories



Case Study

Alternative Asset Mgmt

Receive data from **Operations and Finance** across all Alternative Asset Manager CRE portfolio companies - rely heavily on 3rd parties, bad data impacts operations and reported KPIs

4B+ records in Snowflake growing 10% YoY

Estimated 5 FTEs for 18+ mos to get to ~4k business rules (\$1.4M budget request)

Desire for business SMEs to be directly involved in DQ (rule review, anomaly remediation)

With Qualytics

- ✓ Year 1 investment resulted in estimated **18X ROI**. 1.5 FTE at 75% allocation to manage DQ globally.
- ✓ Expanded by **4X in 18 mos** w/ additional use cases and volume
- ✓ **15K+ rules** in production w/ **96% automated**, mature DQ ops in 2 quarters
- ✓ Enabled **50+ business users** to co-own DQ for respective business units



Case Study

Real Estate

Receive **data from 3rd parties** into an operational data warehouse, sell data aggregation as a product - cannot assume good data, manually wrote 5000+ DQ checks

15B+ records in Google BigQuery

Started building DQ directly into their product, estimated a need to spend \$10M+ to satisfy all needed requirements

Estimated ~600 rules per data source, have 1,000 sources = 60K+ rules needed

With Qalytics

- ✓ **Pivoted their product** to use Qalytics at the core for all data testing and quality assurance
- ✓ **90%+ coverage** on day 1, now **70K+ rules** in production in Y3 with over **93% automated**
- ✓ **~5K anomalies** detected & delegated to data originators per month
- ✓ KPIs checked through Metric, Range checks along with complex business logic written by customer business analysts



Case Study

Global Asset Management

Receive **~40K files per week**, process to databases internally, multiple business units

Utilizes many external systems to manage public market trading. Team of 200+ in investment operations and 300+ in finance involved to ensure good use of 3rd parties.

5 FTEs from data team responsible for doing over 3K reconciliation logic mappings

Billions of dollars on the line for wrong investment operations actions.

With Qualytics

- ✓ DQ framework live with **~18K rules**, programmatically maintaining reconciliation rules at scale while augmenting with automated rules
- ✓ Detecting **10s of thousands of anomalies** per week, driving the work of a **team of up to 500** to reconcile
- ✓ Qualytics is the core of financial and investment operations. Reduced reconciliation cadence from quarterly to weekly, amounting to **95% reduction in effort to maintain \$250B in assets**



Case Study

Insurance

Regulatory and business controls relied on data that could change, drift, or degrade without detection

Thousands of manual data quality rules required ongoing engineering effort and still left coverage gaps

25B+ records in Oracle

Workflows inaccessible to business users and overloaded small data governance team

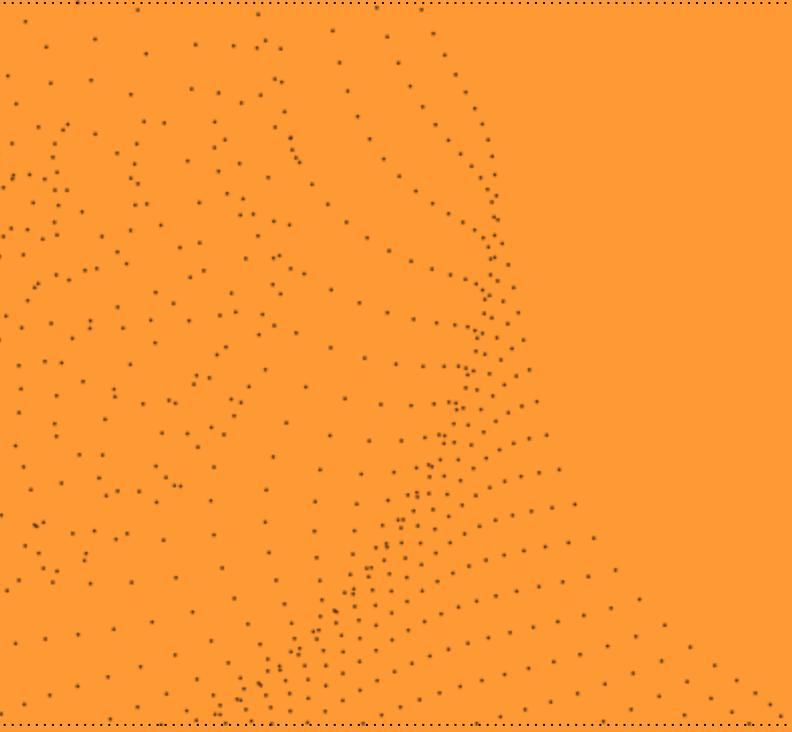
Data issues discovered downstream led to premium leakage and operational risk

With Qualytics

- ✓ **18,335 inferred rules** generated automatically across 19M records
- ✓ **2,950** engineering hours saved & timeline reduced from 9–12 months to just one week
- ✓ Underwriters and analysts can write, refine, and validate rules themselves
- ✓ **\$3.67M** in projected DQ efficiency savings



Use Cases



Use Case

Reconciliation & Data Diff

Source to target data validation is a need that spans multiple use cases. Financial / billing reconciliation, ensuring data being ingested from 3rd party raw files into an enterprise database are only a couple example use cases that require this advanced functionality.

With Qalytics

Qalytics provides full **data diff** functionality across datastore technologies. This ruletype ensures that data integrity is maintained when data is expected to be replicas of each other. Qalytics produces a Left / Right comparison of data to highlight raw data differences.



Reconciliation & Data Diff

Source Records
Displays the specific records from your data that failed the checks

Sort By: Weight Anomalous First Only Anomalous Select fields to show: 3

_qualytics_diff	C_NAME		C_TYPE	
	Corporate	Local	Corporate	Local
added	missing	Aiko Tanaka	missing	Consumer
removed	Nexor Labs	missing	Business	missing
removed	Luka Petrovic	missing	Consumer	missing
removed	Claire Dubois	missing	Consumer	missing
removed	Grid Systems	missing	Business	missing
changed	Axion Inc.	Axion	Business	Business
changed	Mason Reed	Mason & Reed LLC	Consumer	Business
added	missing	James Duncan	missing	Consumer
changed	Daniel Rodriguez	Dan Rodriguez	Consumer	Consumer

Showing 10 out of 12 anomalous records with source record limit of 10



Use Case Entity Resolution

Large enterprises often have similar spellings of entities that should resolve to the same real-world entity. In the financial services industry, example use cases include resolution of business names (JP Morgan Chase vs JP Morgan) that may have multiple spellings, causing duplicate similar entities.

With Qalytics

Qalytics provides **Entity Resolution** capability that looks for spelling similarities within a data field. Users can determine the % similarity to detect, along with pairing substrings and homophones. Users further have the option to utilize *Calculated Fields* to perform light transformations of entity names to remediate downstream.



Entity Resolution

Failed Checks

View the data quality checks that were violated and triggered this anomaly

Failed Check
12 records identified

Filter by anomalous fields 1

#5
Entity Resolution

Check Description
Ensure party and counterparty names are uniquely represented and consistently standardized across systems

Field
BUSINESS_NAME

Check Description
Ensure party and counterparty names are uniquely represented and consistently standardized across systems

Source Records

Displays the specific records from you

Sort By Weight Anomalous First

Only Anomalous

Select fields to show 2

BUSINESS_NAME	BUSINESS_ID
NextGen Solutions Ltd.	16
Green Field Solutions	10
Greenfield Solut.	9
Greenfield Soln.	8
Greenfield Solution	7
Greenfield Solutions LLC	6
Next Generation Solutions Ltd.	20
Next-Gen Solutions Ltd.	19
Next Gen Solutions	18
NextGen Solution	17

Showing 10 out of 12 anomalous records with source record limit of 10

Show up to 10



Use Case

Time-Series Anomalies

Sometimes, a numeric value's acceptability is dependent on its historic values. For customer John Doe, a generalized DQ check of an auto insurance quote (\$1000 to \$3000/yr) may not trigger an error.

But what if we need to check if John Doe's auto insurance quote grew by more than 20% between quotes?

With Qualytics

Metric Checks enable users to define rules that are based on static or dynamic thresholds. This check turns a numeric field into a timeseries field and tracks its acceptable change over time.



Time-Series Anomalies



Qualytics

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