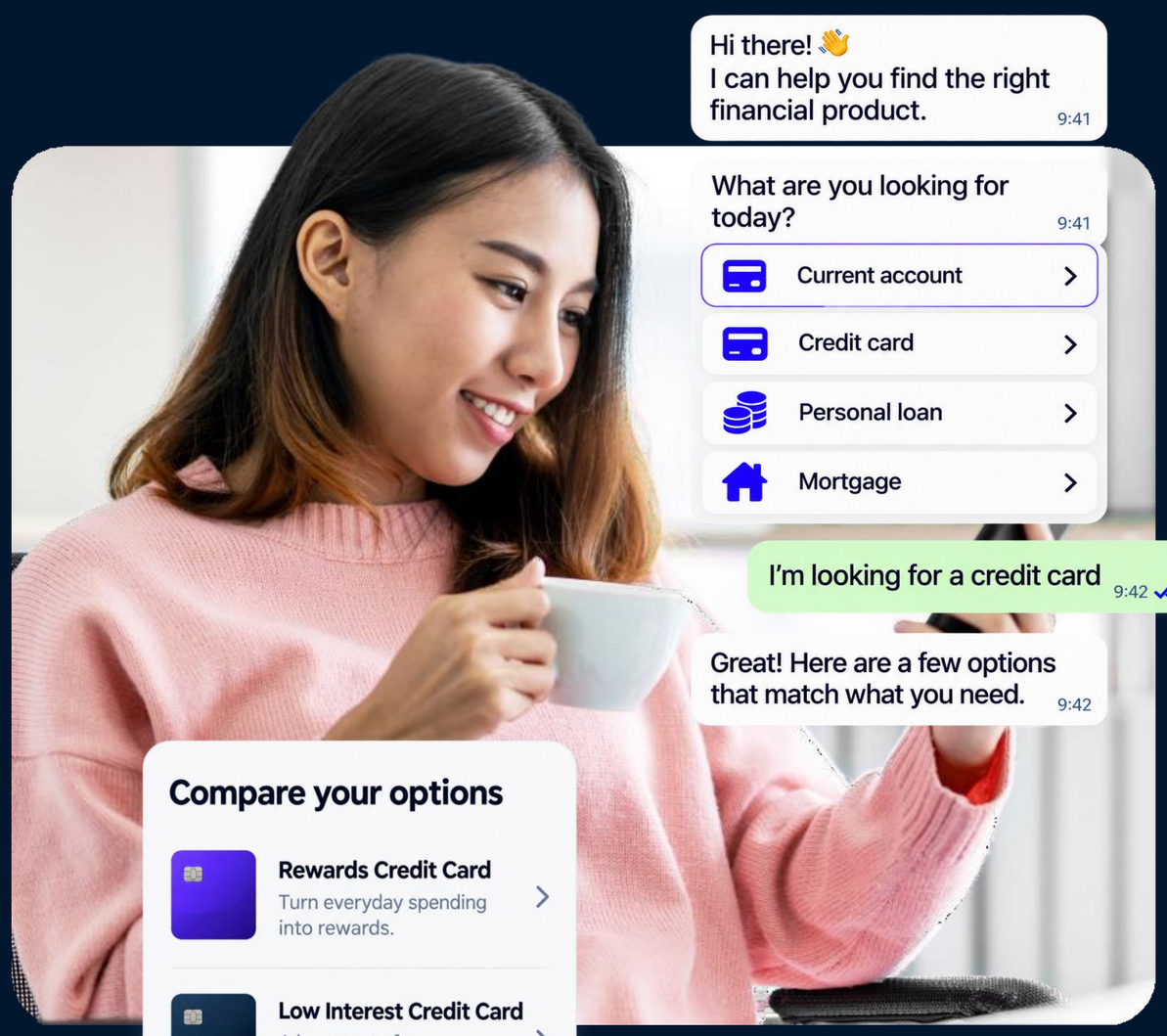
The Data and AI Experience Company

Financial Services

CONVERSATIONAL AI

Finance Discover

Guide customers to the right financial products through chat.



Finance Discover helps prospects find the right product through a guided conversation. It understands their needs, matches and compares products, runs an indicative eligibility check and hands over to an advisor when they are ready.

Meta Channels — Engage and convert across the world's leading messaging platforms

WhatsApp
Business messaging at scale

Instagram
Turn conversations into customers

Messenger
Seamless support and engagement

Complementary Channels — Platform-agnostic, configured for channels beyond Meta

Email
Extend reach beyond Meta

Owned Channels
On web or in app

RCS
Interactive brand experiences

Needs Discovery

Ask a few simple questions to understand what the customer is looking for.

Product Matching and Recommendation

Match each customer to the product that fits their needs.

Eligibility Indicators

Give an indicative eligibility view before a formal application.

Product Explainer and Comparison

Explain products in plain language and compare options in chat.

Compliant Product Messaging

Keep every product message within your approved, regulator-ready wording.

Handover to Leadflow or Advisor

Pass ready customers to Leadflow or a human advisor with full context.

Trusted by global finance leaders

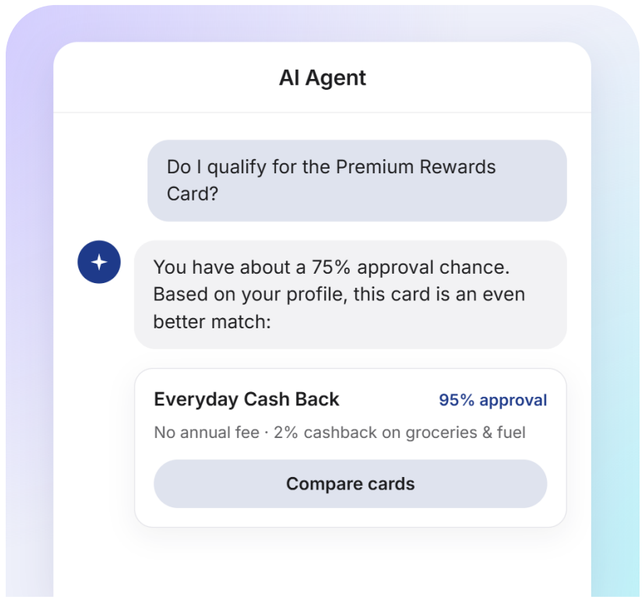
OCBC · DBS · Grab · goto · Maybank · superbank

Fixing the bottlenecks in your current discovery journeys

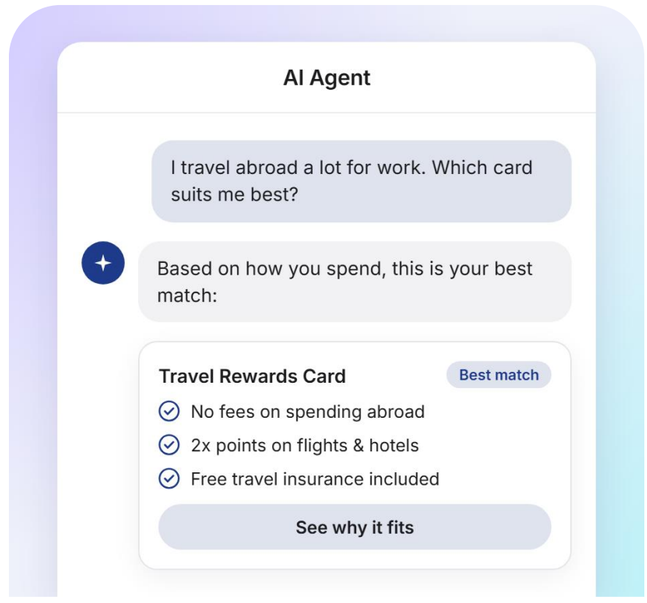
Choosing a financial product shouldn't need a glossary.

Faced with jargon and comparison tables, and unsure whether they'd even be accepted, customers hesitate, bounce, or default to whoever is cheapest.

Am I eligible for this plan?

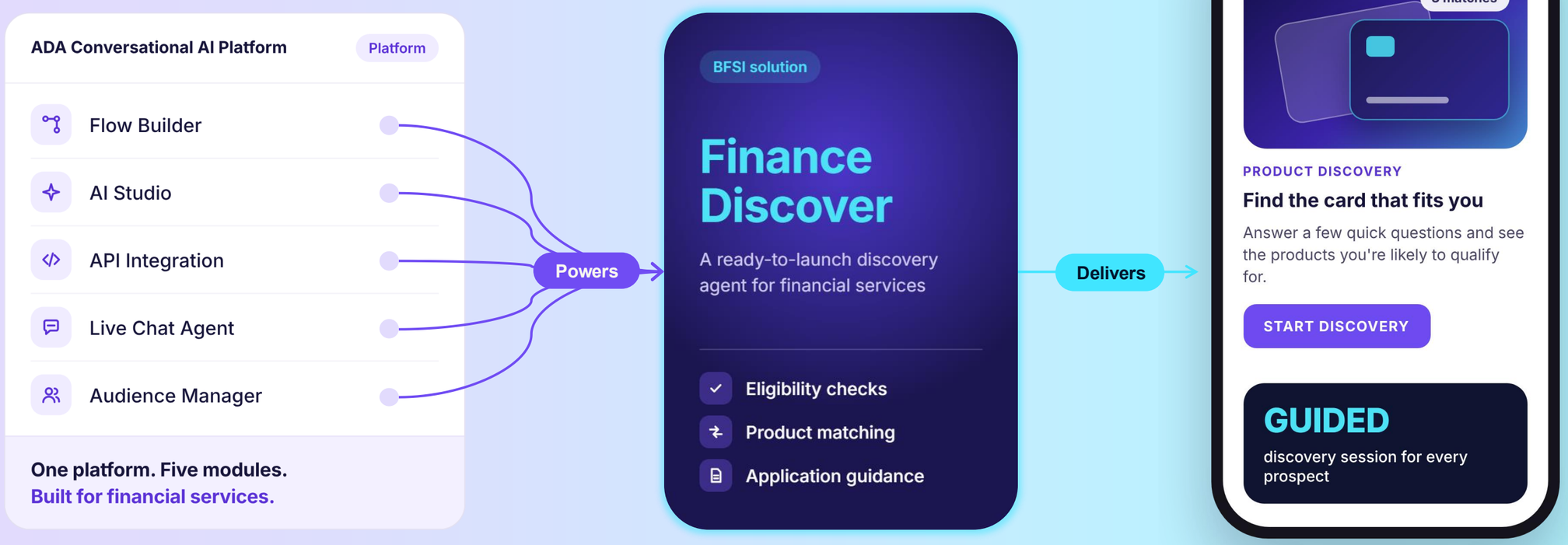


Which one suits me?



Why product discovery works better on ADA's Conversational AI platform

Finance Discover unifies product data, eligibility rules, customer context, and live agents to deliver accurate answers in one seamless experience.



DBS

How DBS drove loan uptake and AUM growth through WhatsApp

ADA enabled DBS to deliver loan offers to eligible existing customers through WhatsApp, with repayment reminders continuing in the same conversation.

Banking - APAC

Loan Cross-sell

Payment Reminders

1.8 x
Higher conversion than legacy channel

Millions
Of customers reached on a familiar channel

End-to-end
Solutions from offer to repayment journey

Increase discovery sessions with Finance Discover

ADA is the Data & AI Experience Company, combining platforms, AI accelerators, and always-on operations to deliver measurable growth at scale.

26B+
Personalized journeys created

278M+
AI-powered conversations to drive engagement

16B+
Authentications verified to protect trust

ada