

lumioinsight

Automate. Understand. Act.

Lumio is a cloud-based data management, reporting, and analytics platform for financial institutions. Lumio provides strategic applications that help institutions make more informative business decisions and gain competitive edge. Our suite of applications contain data analytics, dashboarding, and reporting capabilities that help uncover valuable insight with simple, powerful, and intuitive tools. We are more than a technology provider - we are your partner in uncovering the hidden value within your data.



Actionable Insights for Financial Institutions

Lumio's modular approach gives your bank the ability to customize its insight strategy and purchase only the apps that address the specific needs of the institution. This flexibility gives your bank the ability to leverage data to solve business problems and continuously improve the customer experience.



Deposit Insight

Understand the nuances of your institutions deposit portfolio and provide executives, managers, and front-line staff the information required to manage the bank and provide superior customer service.



Loan Insight

Our Loan Insight takes core and other source data and transforms them into detailed visuals that reveal trends, outliers, and comparative information to help your bank manage essential business.



Customer Insight

Our Customer Insight approach is designed to give banks visibility into the complete customer relationship by using data from various touch points to understand the make-up of your customers.



Financial Insight

Our Financial Insight offers banks on-demand financial data and reporting to monitor real-time performance and measure the overall financial health of the bank.

Maximize Your Return on Data Assets

From insights to actionable strategies, accelerate your decision-making process and drive more value from your data assets.

Integrates with Systems You're Using Today

Overcome integration challenges and eliminate fragmented data views, ensuring seamless integration of data sources for holistic insights.

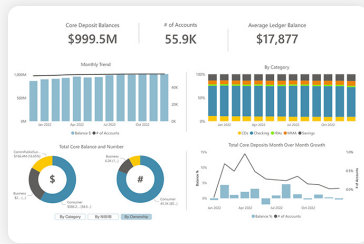
Insight Experts Team Included

Our service goes beyond basic assistance, guiding banks through every step of their data strategy execution for optimal results.

Data Exploration, Data Insights, & Data-Driven Decisions

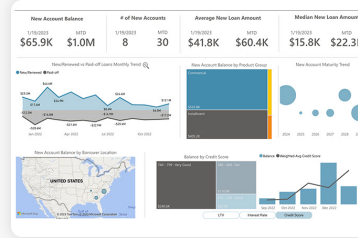
Eliminate manual processes and reduce errors using data integration and workflow automation services. Gain understanding from insightful information refreshed daily – get to know your customers at a deeper level. Act faster as revenue-generating and cost-saving opportunities are presented in almost real-time.

Deposit Insight



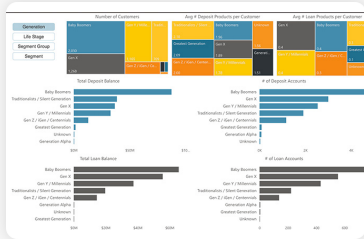
- Core Deposit Analysis
- New Account Analysis
- NSF Analysis
- Balance Change Analysis
- Deposit Movement
- Account Search

Loan Insight



- New/Renewed Dashboard
- Portfolio Dashboard
- Delinquency Dashboard
- Collections Effectiveness
- Product Level Report
- Loan Concentration

Customer Insight



- Segmentation Summary
- Avg Loans to Deposits
- Avg Number of Products
- Consumer Customers Map
- Commercial Customers Map
- Prospects Map

Financial Insight



- Executive Dashboard
- Financial Ratios Dashboard
- Actual vs. Budget Dashboard
- Trial Balance Reports
- Balance Sheet Reports
- Income Statement Reports

All the Ways to Use Lumio

Lumio offers a versatile and seamless user experience by providing multiple self-service options for end users to ensure they have the right tools for generating insight from the bank's operational data.

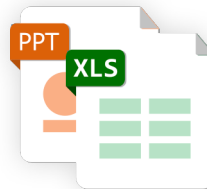
Web Browser or Mobile App



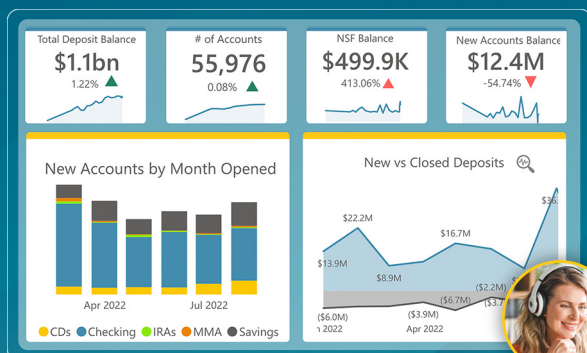
Email Inbox Delivery



Microsoft Office Applications



Intuitive Report Designer Tools



The Lumio Difference

- ✓ Flexible, adaptive, and customized to each bank
- ✓ Insight experts and partners to grow analytics strategy
- ✓ We believe in mapping all data beyond core system data
- ✓ Custom reports and analysis interpretation services