



# Streamlining Distribution and Access to Macroeconomic Trends through a Data Portal

## CUSTOMER CHALLENGE

Fluree was approached by a **financial services leader** known for its presence in investment banking, wealth management, and institutional securities to leverage its enterprise knowledge graph—combined with AI—in its digital publishing flow.

The client's analyst team produces a vast volume of documents and emails annually, containing critical investment intelligence and key recommendations on prominent companies, products, and stakeholders.

**Despite indexing nearly half a million documents to analyze macroeconomic trends for hundreds of business users, the existing publishing workflows inadequately leveraged the knowledge graph to drive search and discovery.**

The client struggled to properly automate content tagging based on semantic standards, while failing to identify and extract emerging topics from core digital assets to grow its data portal and provide a state-of-the-art search experience for business users who need to keep up with the pace of change in the financial industry.

## THE SOLUTION

**Combine Knowledge Graphs with AI to create a composable and automated tagging system**

Fluree introduced a solution to efficiently manage, align, and auto-apply corporate knowledge to unstructured content, delivering the necessary relevance and completeness for business queries.

### Step 1: Unify and Streamline Data Modeling & Maintenance

Fluree ITM established a unified source of truth with enterprise ontology, topical taxonomies, and extensive named entity datasets, serving as a reference knowledge graph for the AI-driven Fluree CAM tagger.

### Step 2: Integrate AI Tagging with Knowledge Graphs and Publishing Chain

After publication, financial documents are auto-processed by Fluree CAM for AI-driven tagging, inference, disambiguation, and relevance scoring. Serving as the automated AI core, Fluree CAM supports personalized content, exploration, and discovery. Once published, financial documents are automatically processed by Fluree CAM for AI-driven tagging, inference, disambiguation and knowledge-based relevance scoring.

### Step 3: Automate real-time and continuous data discovery & improvement

Using Fluree CAM, the client automated the detection, extraction, and scoring of new topics from documents, uncovering unnoticed patterns and relationship that were automatically fed into Fluree ITM for data validation. This eliminated manual curation processes that often resulted in poor quality.

## THE RESULT

**Dynamic and Comprehensive Knowledge Base for Business Intelligence**

By integrating Fluree ITM and CAM into its content supply chain, the client was able to eliminate error-prone tagging processes, establish quality and knowledge-controlled tagging, increase the size of its knowledge base tenfold, and regain the trust of portal users consuming the data.