NVECTA_UseCase_UnifiedIntelligence_August2026

Axis Mutual Fund: From Unified Data to Unified Intelligence

NVECTA — AI-first customer intelligence platform.

The problem

Axis Mutual Fund had already done the hard work of bringing its investor data together. But the understanding stayed scattered. The digital team, the distributor team and the campaign team each read the same investor differently, so a first-time tax-saving investor and a ten-year SIP holder still met near-identical messaging. Sharper audiences meant an IT ticket and a two-week wait.

How AI was used

NVECTA turned that data into one live, shared understanding of each investor. Marketers describe the audience they want in plain English and get it in minutes. The same intelligence then predicts who is about to stop a SIP or is ready to invest more, and chooses the channel, language and moment for each person; drawing only on pre-approved, SEBI-compliant content.

Impact

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SIP continuation up 11%. Additional purchases 2.4x higher.
Dormant folios reactivated: 8%. Campaign launch: two weeks
to under an hour.
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2-line descriptor:

Axis Mutual Fund had unified its data. The missing step was unifying the intelligence on top of it.

Every team now works from the same live understanding of each investor and acts on it automatically.