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HSBC deploys Wealth Intelligence for its wealth management staff to enhance client experience

HSBC Private Bank today announced the launch of Wealth Intelligence, a generative AI-powered ecosystem, for its client-facing staff members, investment counsellors and product specialists to provide its clients with quality market insights and personalised investment strategies.

Powered by OpenAI's Large Language Model (LLM), Wealth Intelligence is the bank's proprietary AI-powered ecosystem built by its in-house developers. The platform is designed to analyse and summarise the bank's research reports and external news feed, currently comprising more than 10,000 data sources.

Wealth Intelligence offers fast and simple access to the comprehensive range of reports published by the bank's award-winning Chief Investment Office. With the bank's open product platform, growing volume of third party product information will also be progressively integrated in the ecosystem's knowledge base.

In the next stage, Wealth Intelligence will be capable of screening and identifying suitable products for the bank's wealth management teams to discuss investment options and asset allocation recommendations with clients.

Commenting on the launch, **Gabriel Castello, CEO, HSBC Global Private Banking a.i.**, said: "Client relationships are core to every private banker. With the rapidly-evolving financial markets, we understand our clients have stronger expectations for timely, trustworthy and personalised investment advice than ever. Riding on our deep institutional knowledge and experience, our wealth management teams can now leverage these AI capabilities to spare more time to attend to our clients' unique investment objectives and portfolio optimisation needs."

Following its initial roll out in Hong Kong and Singapore, Wealth Intelligence will be scaled to more markets to serve the bank's expanding client needs globally.

Lavanya Chari, Head of Wealth and Premier Solutions, HSBC, added: "AI adoption is one of our core strategic pillars for enhancing our client experience at scale. By harnessing AI's analytical power and data delivery speed, we continue to upskill our wealth management talent, transform our workflows and client journeys to support our clients in making better data-driven decisions to achieve their goals."

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About HSBC Private Bank

HSBC Private Bank helps clients manage, grow and preserve their wealth for generations to come. Its network of global experts helps clients access investment opportunities around the world, plan for the future with wealth and succession planning, manage their portfolio with tailored solutions, and find the right support for their philanthropy.

www.privatebanking.hsbc.com

About HSBC Holdings plc

HSBC Holdings plc, the parent company of HSBC, is headquartered in London. HSBC serves customers worldwide from offices in 57 countries and territories. With assets of USD3,214 billion at 30 June 2025, HSBC is one of the world's largest banking and financial services organisations.

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