



Profile Software announces AI.Adaptive upgrade featuring Agentic AI

Athens, 23 September 2025: [Profile](#), a leading global financial solutions provider, has announced a major upgrade to its [AI.Adaptive](#) solution, introducing advanced **agentic capabilities** that redefine intelligent automation and transform how financial institutions and organisations operate, requiring minimal human intervention for proper execution of operations.

The enhanced solution delivers a **modular** suite of **AI-powered services**, including Document Intelligence, Compliance Checker, Eligibility Checker, Transcription Tool, VaultRAG, and Text-to-Action. These services streamline operations, strengthen compliance, and enhance customer experience within a secure, scalable infrastructure. Built with **bank-grade security**, AI.Adaptive ensures robust protection across all modules.

AI.Adaptive operates as a **standalone solution** or as part of **Profile's fintech product suite** including Axia, Finuevo, Acumen.plus, Centevo, RiskAvert and RegiStar. Its capabilities extend across banking, investment management, and a wide range of industries such as insurance, accounting, telecommunications, utilities, energy, healthcare, education, justice, transportation and mission-critical defence applications.

The upgrade introduces **Agentic AI**, enabling **autonomous** orchestration of workflows, **real-time** insights, and **proactive** decision-making. The four distinct categories and their corresponding modules within the AI.Adaptive solution include the following:

1) Data & Document Processing

These modules automate and enhance the way financial data is captured, processed, and interpreted.

- **Document Intelligence:** Automates document processing (such as statements, invoices, and tax documents) by extracting key data.
- **VaultRAG:** Turns repositories into intelligent knowledge bases using retrieval-augmented generation for natural language queries.
- **Transcription Tool:** Converts audio to text with financial term recognition. Future updates add meeting insights and analytics.

2) Decision Support & Client Engagement

Modules that drive smarter decisions and deeper client relationships through AI-powered insights.

- **Next Best Action Engine:** Suggests product opportunities, risk alerts, and portfolio adjustments based on client behaviour and market trends.
- **Meeting Preparation Assistant:** Prepares agendas and synthesizes client histories for more meaningful interactions.
- **AI-Driven Insights & Explanations:** Delivers human-readable portfolio summaries and KPI interpretations (e.g., IRR, Sharpe), highlighting trends and risks.
- **Investment LLM Evaluation:** Provides a pathway to assess and integrate domain-specific models for advanced analytics and decision support.
- **Customer Assistant:** Enables end-user interaction through digital channels for enquiries and actions, replacing phone support.

3) Compliance & Eligibility Automation

Tools that ensure regulatory alignment and transparent decision-making.

- **Compliance Checker:** Detects regulatory issues (e.g., DORA, GDPR, MiFID II) in contracts and documents with third parties, providing actionable suggestions and annotated revisions.
- **Eligibility Checker:** Combines rule-based logic and machine learning for transparent, explainable loan decisions.

4) Natural Language Interfaces & Workflow Automation

Modules that simplify operations through intuitive, language-based commands and assistance.

- **Text-to-Action:** Executes SQL databases and API operations via natural language commands for faster workflows.
- **Natural Language Action Execution:** Lets users perform tasks with plain commands (e.g., “Buy 100 shares of Company X”), streamlining processes.
- **User Assistant Chatbot:** Real-time help trained on manuals and configuration guides, reducing support dependency and speeding onboarding.

AI.Adaptive also delivers key benefits that enhance responsiveness, automation, and situational clarity. It will provide **real-time operational awareness** by offering a unified view of data across systems, enabling teams to act swiftly and with confidence. Through **adaptive recognition and response**, the solution will detect patterns or anomalies and will initiate intelligent, automated actions to address them proactively. Additionally, **autonomous tasking and decision-making** capabilities will allow the system to prioritise and execute tasks without manual input, improving speed, accuracy, and overall agility.

AI.Adaptive is available and can be tailored to meet the specific needs of financial institutions and organisations across multiple industries. Profile continues to support its clients through live demonstrations and case studies, making it easier to adopt the solution and highlighting its practical benefits. Beyond the immediate outcomes, this upgrade also lays the foundation for Profile’s broader vision regarding the AI Agentic platform: a compliance-grade marketplace of digital employees, designed to meet the complex requirements of the financial industry and scalable to other industries where governance, security, and automation are critical.