
Press Release

October 31, 2022

Granted a Patent for the Sales Support System implemented in Sales-Cue

Tokyo, Japan – MINKABU THE INFONOID, Inc., (hereinafter “Minkabu”, Representative: Ken Uryu, Founder and CEO/CFO) announces that the Japanese Patent Office made a decision to grant Minkabu’s patent application (Application Number: 2019-133195) for the sales support system implemented in “Sales-Cue”, the information solutions for a sales representative in financial institutions.

■ Summery of the sales support system

The “sales support system”, which is the object of the patent of the grant, constitutes the part of functionalities in “Sales-Cue”, the information solutions for a sales representative in financial institutions. It relates to the technologies in extracting a prospective customer by utilizing the customer’s profile, financial product profile table, and news distribution system. It also relates to the technologies of streamlining sales activities through showing sales know-how.

In a current financial institution, an appropriate and timely proposal of financial products for customers is the issue since the diversification of the products causes complicated proposals and it takes time to train sales representatives. The “sales support system” realizes improving and streamlining the sales activities by raising timely sales opportunities and sharing the organized know-how of sales representatives, which derive from extracting the financial products which meet the needs of each customer by utilizing the combination of customers’ profile, financial product profile, and many information contents and market information that includes Minkabu’s viewpoint.

■ Utilizing the sales support system in Sales-Cue

The granted-a-patent technologies are implemented in “Sales-Cue”, proposal-type sales support solutions used by financial institutions, and it is provided as “alert functionalities” and “suggestion functionalities” which work together with customer information system (CRM) in

financial institutions. By combining market information such as each stock issuer's financial results and corporate actions etc., the customer's portfolio, and the sales histories of each customer, it provides timely information such as stock information unique to each customer's interest, which results in the best suggestion of financial products to the customers.

<Alert functionalities>

By utilizing Minkabu's strengths in rapid delivery of news articles, the system alerts the limit price, the financial results, the up-down ratio of stocks and the limit price, up-down ratio, redemption date of the investment trust, which provides the timing of the contact from the sales representative to the customer. As the product alert engine can set up alerts by customers and it watches the market by 24 hours a day, 7 days a week, the system enables the active suggestion of transactions for customers. Further, a list of registered alerts by customers can be shown on the screen and can be edited.

(The screenshot of alert registration)

アラート登録

入力日時【必須】 2019/08/27 13:04

商品 投資信託 カテゴリー 価格アラート

銘柄 [検索] 銘柄名

登録時価格 [] 円 上限 [] 円以上 下限 [] 円以下

期間 2019/08/27

備考

表示済み 表示済み

お客様検索

口座 014 1111114

顧客ID 1000004

お客様名 四日市太郎

閉じる 登録する

お客様検索

顧客ID	口座	お客様名
1000001	01-1111111	一本木一郎
1000002	02-2222202	二本木太郎
1000003	013-1111113	三本木太郎
1000004	014-1111114	四日市太郎

商品 株式 カテゴリー 価格アラート

銘柄コード [検索] 銘柄名 市場 東証

登録時価格 1041 円 上限 1040 円以上 下限 1040 円以下

期間 2019/09/27

表示済み 表示済み

アラートが発動した銘柄名・銘柄コード
 価格が1040円以上になりました。
 アラートを消す

価格関する通知が再び必要な場合は、再度登録してください。

(The screenshot of the list of registered alerts)

商品分類	顧客ID	顧客名	商品名	カテゴリ	内容	期間	保有人数	編集	削除	表示済み
投資信託	1000001	一本木一部	日立国内株式インデックスファンド(7831401C)	価格アラート	登録時価格:18,788,下限:18,000,上限:19,000,	2019/08/27	0名	編集	削除	<input type="checkbox"/>
株式	1000002	二本木太郎	クボタ(6326)	CA	コーポレートアクションの規制信用規制その他規制	2019/08/27	0名	編集	削除	<input type="checkbox"/>
株式	1000003	三本木太郎	クボタ(6326)	騰落率アラート	登録時価格:1,503,下落率:5%,上昇率:10%,	2019/09/30	0名	編集	削除	<input type="checkbox"/>
株式	1000004	四日市太郎	トヨタ(7203)	価格アラート	登録時価格:6,869,下限:680,上限:7,000,	2019/09/30	0名	編集	削除	<input type="checkbox"/>
株式	1000004	四日市太郎	クボタ(6326)	決算	通知日:3	2019/10/31	0名	編集	削除	<input type="checkbox"/>
投資信託	1000002	二本木太郎	第4回野村短期公社債ファンド(01311034)	価格アラート	登録時価格:6,935,上限:7,000,	2019/08/26	0名	編集	削除	<input type="checkbox"/>
投資信託	1000002	二本木太郎	野村エマージング・ソブリン内投資型1.1.1.0(01211111A)	価格アラート	登録時価格:9,635,上限:10,000,	2019/08/26	0名	編集	削除	<input type="checkbox"/>
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株式	1000002	二本木太郎	SBI(8473)	価格アラート	登録時価格:2,174,上限:2,000,	2019/08/22	1名	編集	削除	<input checked="" type="checkbox"/>
株式	1000001	一本木一部	極洋(1301)	価格アラート	登録時価格:2,817,下限:2,800,上限:2,840,	2019/08/26	0名	編集	削除	<input checked="" type="checkbox"/>

全24件から、1から10件目まで表示しています ページ当たり最大 10 件

<Suggestion functionalities >

The system creates and sorts out “prospective customers with/without transaction history (today)” from the combination of the customer’s profile, the customer’s transaction histories, the asset status of a customer, the frequency of contact with sales representatives, etc. As the system extracts the prospective customer, it increases the opportunity of a transaction and reduces the sales representative’s burden. By extracting the prospective customer from transaction histories, sales representatives can actively contact the less active customers, resulting in more transaction opportunities.

(The screenshot of the list of prospective customers)

種類	提案日	口座番号	コンプラランク	お客様名	おすすめ度	おすすめタイプ	銘柄	連絡方法/時間	電話番号	結果
株	2019/08/01	01-1111111	A	一本木一部	低	大型 & 高配当 & 割安	極洋(1301)	--	031111111	<input type="checkbox"/>
投資	2019/08/02	01-1111111	A	一本木一部	高	高配当	極洋(1301)	--	031111111	<input type="checkbox"/>
株	2019/08/14	01-1111111	A	一本木一部	高	割安成長	昭電工(4004)	--	031111111	<input type="checkbox"/>
投資	2019/08/14	01-1111111	A	一本木一部	高	割安成長	グローバル・バリュー・オープン(01314968)	--	031111111	<input type="checkbox"/>
株	2019/08/14	01-1111111	A	一本木一部	低	割安追求	昭電工(4004)	--	031111111	<input type="checkbox"/>
投資	2019/08/14	01-1111111	A	一本木一部	低	割安追求	(野村インデックスF)内外7資産バランス・為替ヘッジ型(01313139)	--	031111111	<input type="checkbox"/>
投資	2019/08/21	01-1111111	A	一本木一部	高	大型 & 高配当 & 割安	マクミル(3978)	--	031111111	<input type="checkbox"/>
投資	2019/08/21	01-1111111	A	一本木一部	低	大型 & 高配当 & 割安	出光興産(5019)	--	031111111	<input type="checkbox"/>
投資	2019/08/21	01-1111111	A	一本木一部	高	大型 & 高配当 & 割安	国際アジア・リートF<インドネシア・ルビア>(毎月決算型)(0331413L)	--	031111111	<input type="checkbox"/>
株	2019/08/14	02-2222202	B	二本木太郎	高	高配当	マクセルHD(6810)	--	011111111	<input type="checkbox"/>

■Recommendation degree
Showing suggested financial products to each customer by recommendation degree (low to high)

■Suggested stocks
Showing the recommended financial products based on the recommendation degree and the type of recommendation

■Type of recommendation
Showing the type of recommendation based on the analysis of the transaction history of a customer

■Input the results of the suggestion
Enhancing the customer profile analysis by inputting the results of the suggestion to the “contact history screen” linked to the button in the column

Further, Sales-Cue has the following many Japanese and overseas market information as well as a sales support system. The market information can be provided through the API and multiple financial institutions mainly consisting of major internet stockbrokers.

«The summary of market information in Sales-Cue »

- Stock information solution by the subject
The solution classifies the stock information in Japan and overseas by over 1,500 subjects (semiconductor, metaverse etc.) and provides index information on the subjects, information on related stocks and attention degree of the subject (based on the sum of access logs from “MINKABU” and dedicated stock information media, “Kabutan”)
- Cross-selling information
Sale-Cue information DB captures stocks that investment trusts put in and it can search the investment trusts that are put in each stock.
- AI financial results analysis (visual solution of financial results)
Minkabu’s unique AI provides auto-generated documents about earnings releases for Japanese/US stocks that show a 5-point scale of financial results with the basis of the evaluation.

By the combination of the sales support system and market information DB in Sales-Cue, Minkabu flexibly deals with the different issues of each financial institution resulting in the development of each financial institution’s business and it will continuously develop the services and the technologies which support human life.

■ MINKABU THE INFONOID, Inc. (<https://minkabu.co.jp/en>)

Minkabu operates large scaled media in Japan namely “MINKABU”, an asset building information media, and “Kabutan”, stock information dedicated media. Through these media, Minkabu provides various financial information including cryptocurrency, forex, commodity futures, mutual funds, insurance, and real estate, in addition to stocks. In addition, Minkabu provides various solution products to financial institutions, utilizing crowd inputs of users’ posting and browsing, and AI which analyzes big data and instantly generates content.

Company Name:	MINKABU THE INFONOID, Inc.
Head Office:	1-8-10 KudanKita, Chiyoda-ku, Tokyo
Founded:	July 7th, 2006
Representative:	Ken Uryu (Founder and CEO/CFO)
Business:	Media business, Solution business

Group companies: Prop Tech plus Inc., Robot Fund Co., Ltd.,
MINKABU ASSET PARTNERS, Inc.,
MINKABU WEB3 WALLET, Inc.
ALIS Co., Ltd.

■ Information media operated by MINKABU Group

MINKABU: <https://minkabu.jp/>

Kabutan: <https://kabutan.jp/>

Kabutan US Equities: <https://us.kabutan.jp/>

MINKABU Choice: <https://minkabu.co.jp/choice/>

Japan REIT.COM*: <http://www.japan-reit.com/>

JAPAN PRIVATE REIT.COM*: <https://www.japan-private-reit.com/>

*Operated by Prop Tech plus Inc.

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