

Factsheet - Finastra Loan Portal

Experience the convenience of digitized self-service with the Finastra Loan Portal

Powered by Finastra Corporate Channels

Corporates place a premium on efficiency, but the loan servicing experience offered by most financial institutions falls short of meeting current expectations for a fast and seamless service. Instead, loan servicing is a mix of paper-based processes and outdated means of communication that ultimately hinder customer satisfaction and operational effectiveness.

Banks are struggling to scale their business in today's lending environment.

Market size and complexity

The loan market has seen considerable growth in recent years, with global issuance in 2024 reaching \$5.5 trillion¹. As the loan issuance market has grown, so too have deal sizes and lender groups, which can now reach upwards of 1,000. The loan asset class also carries with it a high degree of complexity, with loan agreements that are highly sophisticated, bespoke and constantly evolving. Despite the size and intricacy of the asset class, the market has been slow to evolve and adopt innovation at the pace required to bring the efficiency required to enable further growth.



Seamlessly integrated with Finastra's Loan IQ platform, our portal empowers corporate clients to access real-time loan data across multiple channels and enjoy secure communication with loan officers and effortlessly initiate transactions, all in one place.

1. [Debtwire: Loan Highlights 2024](#)

Competition

The commercial lending market is highly competitive, with banks and non-bank financial institutions vying for market share. This increased competition threatens banks' market share, leading to margin compression and increased credit risk as lending standards become more relaxed. It's more important than ever for FIs to differentiate themselves from their peers by delivering a best-in-class client experience that seamlessly ties together all aspects of the lending process from origination through servicing.

Customer expectations

Customer priorities are shifting to expect a more retail-like experience that offers speed, transparency, self-service and automation via digital channels. Clients are looking for integrated solutions that will enable them to stay on the cutting edge and quickly capitalize on market trends. Interoperability that enables collaboration across platforms is in high demand and requires solutions that are open and integrated. Financial institutions with the ability to quickly innovate and adapt will be best positioned to meet the evolving needs of today's corporate customer.

Empowering corporates with simplified and streamlined self-service capabilities allows banks to foster stronger customer loyalty and achieve substantial cost savings. This strategic move not only enhances client satisfaction but also drives operational efficiency, positioning banks for long-term success.



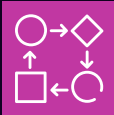
Loan Portal – Key features

Enable self-service for faster, better business decisions.



Enhanced information visibility

Our Loan Portal, built on a modern Angular UI, provides real-time information from Loan IQ. Access comprehensive details on deals, facility commitments, repayment schedules, bills, and more.



Seamless transaction workflows

Perform a variety of loan operations such as initiation, increases, rollovers, and payments with ease. Our intuitive workflows integrate seamlessly with back-office systems, allowing you to track all requests based on transaction status.



Personalized dashboards

Enjoy personalized dashboards tailored to your specific needs and actions, based on your user persona. Get the information you need, when you need it.

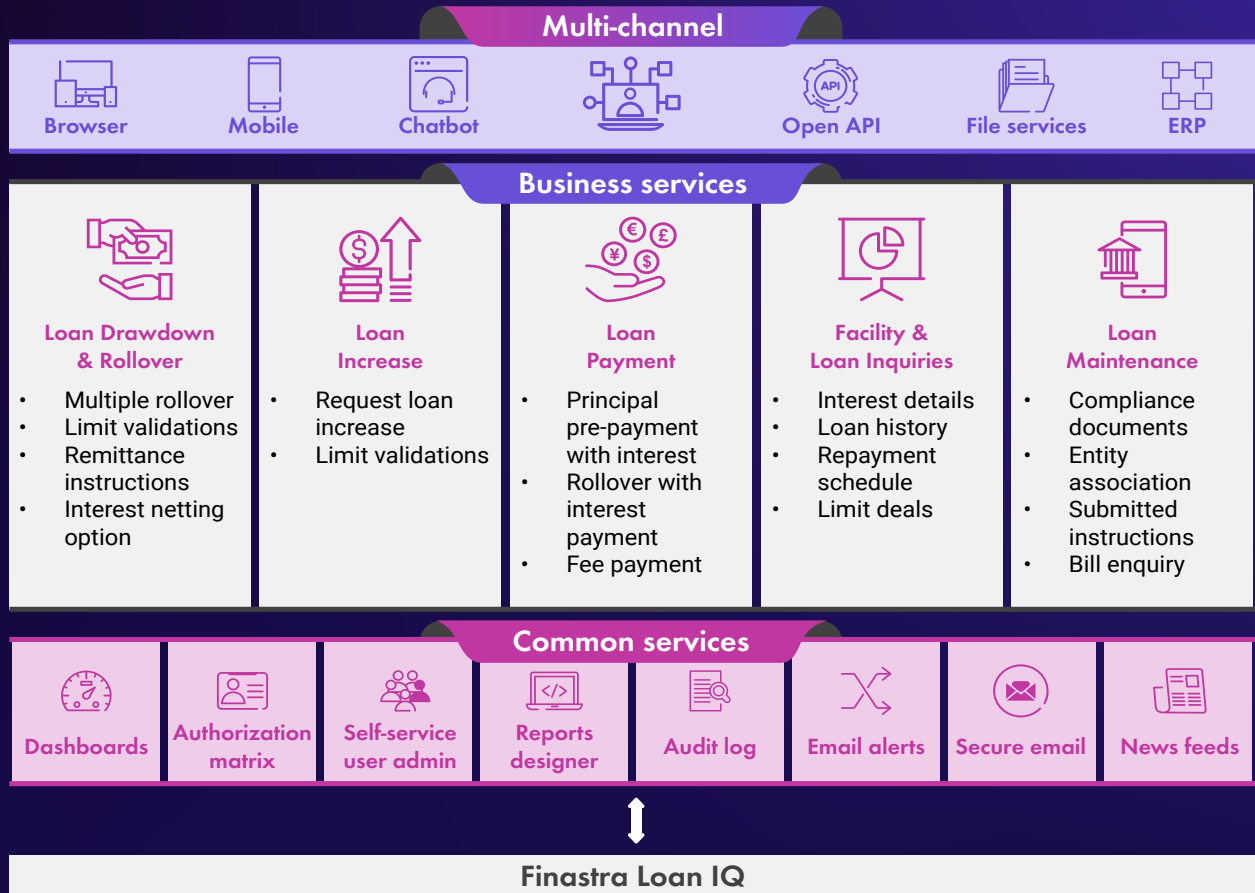


Simplified relationship management

The portal provides custom communication tools for real-time interaction with bank personnel and secure document uploads. Relationship managers receive automatic email alerts for borrower transactions and requests.

Loan Portal

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The Loan Portal advantage

Empower corporates with efficient self-service solutions to boost customer loyalty and cut operational costs.



Enhanced customer loyalty

By offering a user-friendly, self-service portal, banks can significantly improve the customer experience. The Loan Portal allows corporate clients to access real-time loan data, manage transactions, and communicate securely with bank personnel. This convenience and efficiency foster stronger customer relationships and loyalty.



Operational efficiency

The Loan Portal streamlines various loan operations, such as initiation, increases, rollovers, and payments, through intuitive workflows that integrate seamlessly with back-office systems. This reduces the need for manual processes, minimizes errors, and saves time, leading to substantial operational cost savings.



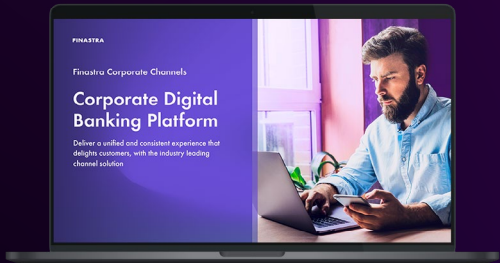
Competitive differentiation

In a highly competitive lending market, the Loan Portal helps banks stand out by providing a best-in-class client experience. The portal's modern UI, personalized dashboards, and seamless transaction workflows position banks as innovative and responsive to client needs, giving them a competitive edge.

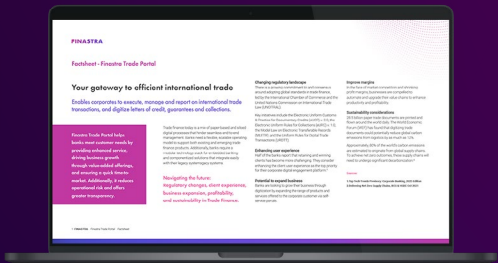


Create an omni-channel experience with Finastra Corporate Channels and Unified Corporate Portal

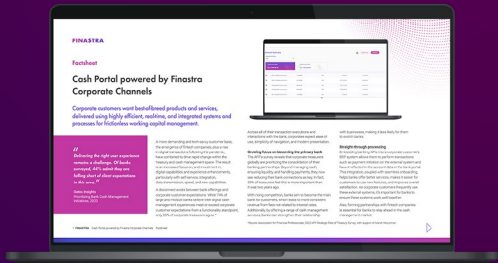
Single portal for all your servicing needs including trade and supply chain finance, cash management, lending and treasury.



Finastra Corporate Channels

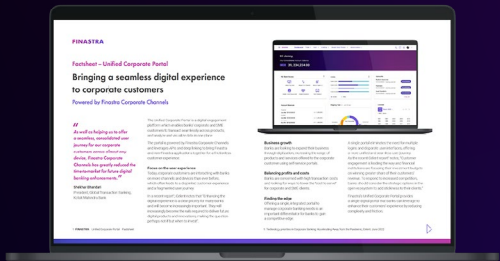


Finastra Trade Portal



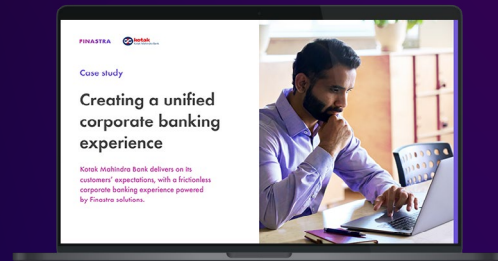
Finastra Cash Portal

Take an open approach to digital experience with Unified Corporate Portal.



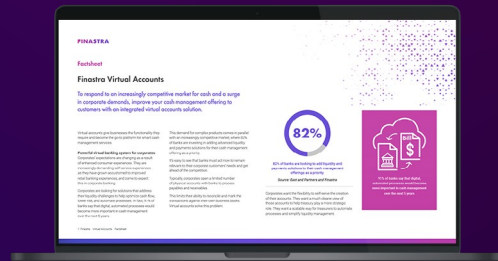
Unified Corporate Portal

Find out how Kotak Mahindra Bank leveraged our solution to stay ahead in the game.

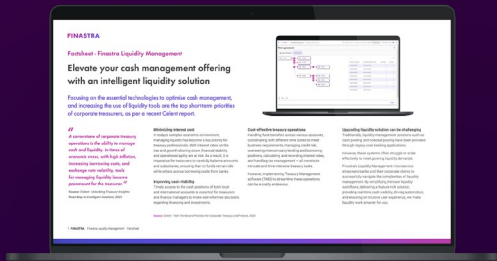


Kotak Mahindra Bank - Success Story

Elevate your cash management offering with our Virtual Accounts and Liquidity solutions.



Finastra Virtual Accounts



Finastra Liquidity Management

[Contact us](#)

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