

EXECUTIVE SUMMARY

Snapshot of workforce, client base, onboarding coverage, and contract health

Client ID

Client Name

Dealing Mode

Total Clients

526

Inactive

92

Returned

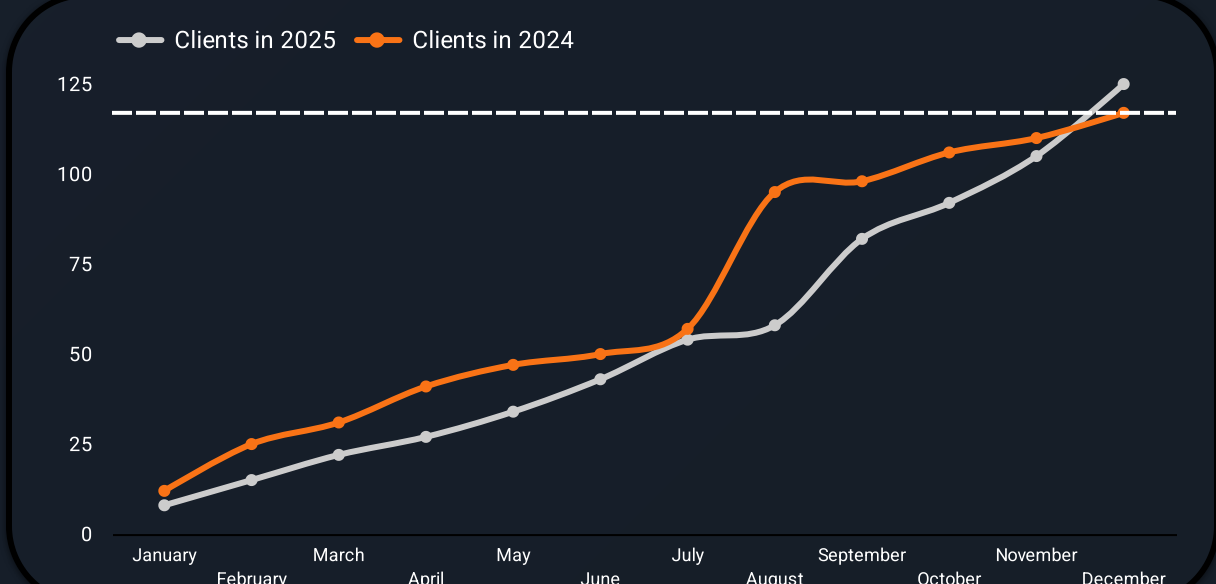
2

Approved

428

Draft

4



17% of clients are currently inactive, concentrated primarily in ORION and ATLAS agreements

INDUSTRY ONBOARDING COMPLIANCE

Regional Head

Dealing Mode

Product Name

Client Status Overview

Client Status	Total Clients
Active	428
Draft	4
Inactive	92
Pending	2
Total Clients	526

Entity Status Overview

Agreement Name	Clients	Active Clients	Active Ratio %
OTHER	19	9	47%
ATLAS	102	76	75%
NEXUS	16	12	75%
ORION	386	328	85%
TITAN	3	3	100%
Total Clients	526	428	81%

Client Status – Detailed View

Client ID	Client Name	Region Name	Status
8899002558	Bridgeway Associates	North	Returned
8899002536	Oakridge Solutions	North	Returned
8899002390	HorizonCore Systems	West	Inactive
8899002402	Ardent Valley Group	North	Inactive
8899002584	Basecore Services	East	Inactive
8899002609	Signalpath Solutions	West	Inactive
8899002097	Datacrest Solutions	West	Inactive
8899002672	Guideline Solutions	North	Inactive
8899002481	Northfield Dynamics	North	Inactive
8899002457	Northloop Advisory	West	Inactive
8899002430	Westhaven Global	East	Inactive
8899002413	Cleanwater Matrix	East	Inactive
8899002482	Insightpath Global	North	Inactive
8899002479	Edgecrest Consulting	North	Inactive
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Regional Head – Client Compliance Performance



17% of clients are currently inactive, concentrated primarily in ORION and ATLAS agreements

Dealing Mode– Client Compliance Performance



Client activity effectiveness across engagement models

Monthly Onboarding Trend – Calendar Year Comparison

Top 5 - Calendar Year / Client ID					
Onboarding Month	CY 2025	CY 2024	CY 2023	CY 2022	CY 2021
January	9	16	2	0	1
February	7	14	30	3	4
March	11	7	3	10	0
April	6	12	11	1	1
May	7	7	9	1	2
June	9	4	6	1	0
July	11	8	0	0	6
August	4	40	2	0	1
September		5	5	2	0
October	10	10	3	3	3
November	13	5	5	0	0
December	22	7	5	9	3
Grand total	133	135	127	30	21

Onboarding activity demonstrates consistent seasonality, with peak volumes concentrated in Q3–Q4 across all years, and the highest single-month onboarding recorded in August 2024

Document compliance is heavily concentrated in ORION and ATLAS, driven primarily by MOU and WC coverage

INDUSTRY DOCUMENT COMPLIANCE

Regional Head

Dealing Mode

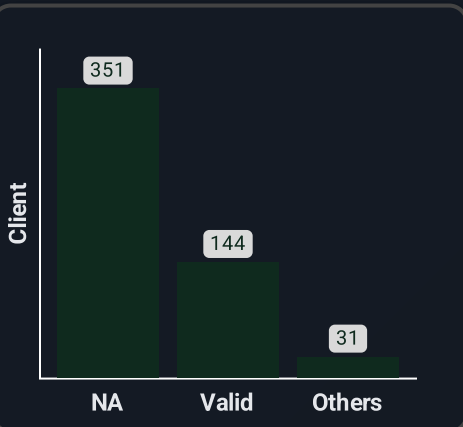
Product Name

Agreement-wise Client Distribution

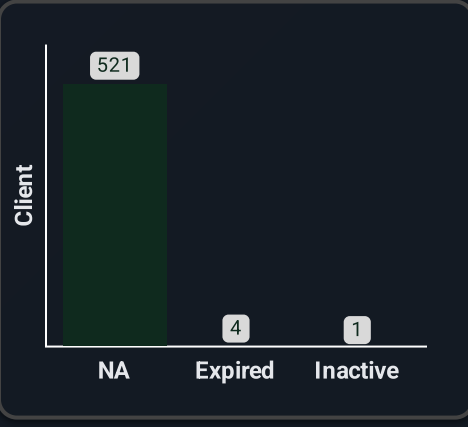
Parent Group	Active Clients	MOU	WC	MC	GPA
ORION	328	290	133	0	0
ATLAS	76	60	10	0	0
NEXUS	12	7	1	0	0
NULL	9	1	0	0	0
TITAN	3	3	0	0	0
Total Clients	428	361	144	0	0

ORION and ATLAS drive over 95% of active document coverage, primarily through MOU and WC

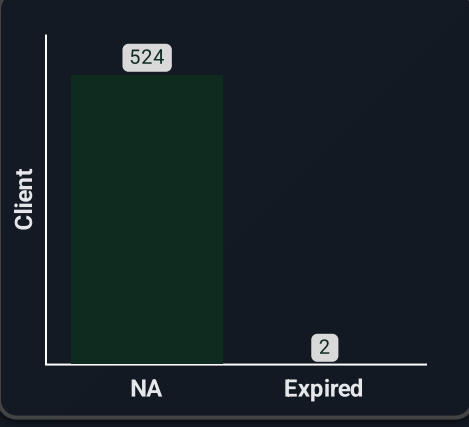
Workmen Compensation



Mediclaim Compensation



GPA



Client-wise Document Status

Client Name	Region Name	Regional Head	MOU	WC	MC	GPA
Vertexa Global	North	Sourav Chatterjee	Valid	Valid	NA	NA
Quantiscore Analytics	North	Sourav Chatterjee	Valid	Expired	NA	NA
Meridian Crest Group	North	Sourav Chatterjee	Valid	Valid	NA	NA
Optivanta Services	South	Arvind Krishnan	Valid	NA	NA	NA
Nexora Technologies	South	Arvind Krishnan	Expired	NA	NA	NA
Silverline Operations	North	Sourav Chatterjee	Valid	Valid	NA	NA
StratEdge Partners	North	Sourav Chatterjee	Expired	Expired	Expired	Expired
Heliosync Solutions	South	Arvind Krishnan	NA	NA	NA	NA
CoreVista Group	North	Sourav Chatterjee	Valid	Valid	NA	NA
Elevon Dynamics	North	Sourav Chatterjee	Valid	Valid	NA	NA
PrimeAxis Corporation	East	Debashis Mohanty	Expired	NA	NA	NA
Crestfall Industries	South	Arvind Krishnan	Expired	NA	NA	NA
Infralyx Services	West	Sanjay Kulkarni	Valid	NA	NA	NA
TrueNorth Advisory	West	Sanjay Kulkarni	Valid	NA	NA	NA
Noventa Works	East	Debashis Mohanty	Valid	NA	NA	NA
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Client Contract Renewal Tracker

Client ID	Client Name	Dealing Mode	Regional Head	Contract Start Date	Contract end date	Expiring Status
8899002542	Trustline Services	OMEGA	Sourav Chatterjee	Feb 25, 2025	Feb 24, 2026	Expiring Next Month

Contracts approaching expiry require renewal initiation to avoid service disruption

MOU Status Overview

MOU	Clients
Valid	361
Inactive	83
Expired	59
NA	18
Draft	4
Returned	1
Total Clients	526

Client – Agreement-wise Client Distribution

Status	Active Client...	MOU	WC	MC	GPA
Approved	428	361	144	0	0
Returned	0	0	0	0	0
Draft	0	0	0	0	0
Inactive	0	0	0	0	0
Total Clients	428	361	144	0	0

Regional Head – Agreement-wise Client Distribution

Regional Head	Active Clients	MOU	WC	MC	GPA
Sourav Chatterjee	146	112	10	0	0
Debashis Mohanty	146	135	133	0	0
Sanjay Kulkarni	69	66	0	0	0
Rajesh Verma	20	20	0	0	0
Arvind Krishnan	19	4	0	0	0
Anirban Sen	14	10	1	0	0
Amit Tiwari	7	7	0	0	0
Venkatesh Rao	6	6	0	0	0
Central Office	1	1	0	0	0
Total Clients	428	361	144	0	0