

CLIENT DATABASE



EXECUTIVE SUMMARY

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

Total Clients

526

Inactive
92

Returned
2

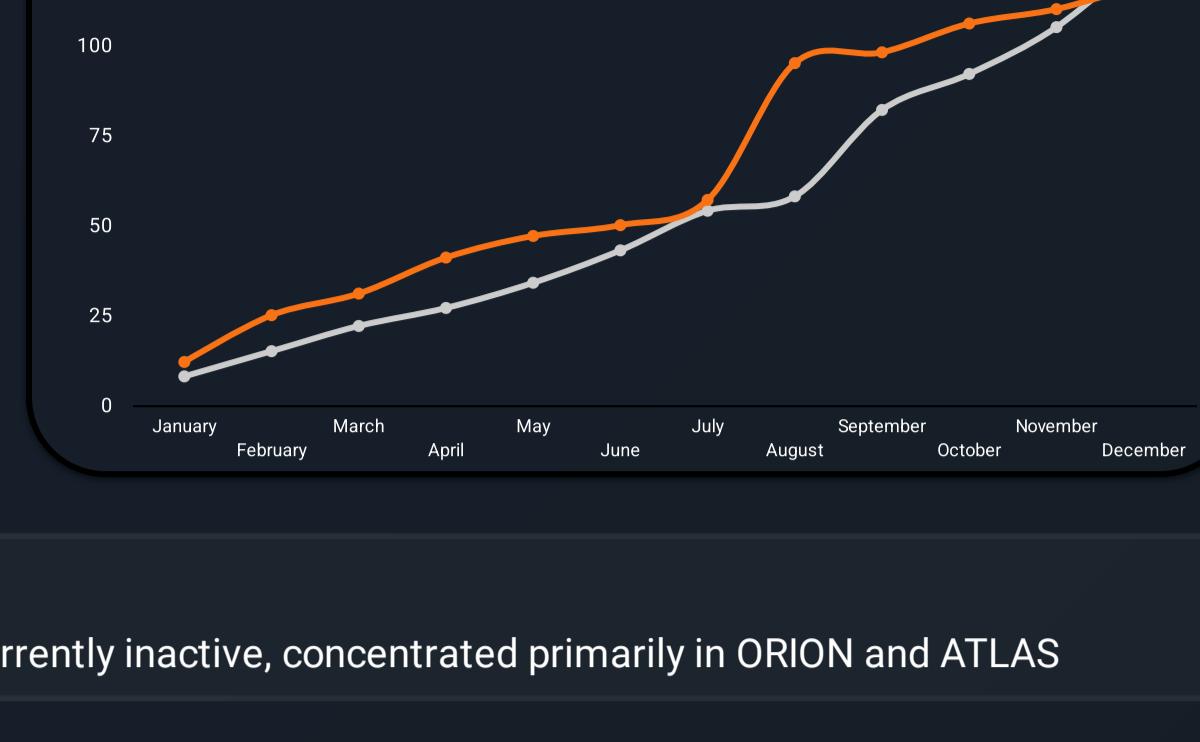
Approved
428

Draft
4

Client ID

Client Name

Dealing Mode



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

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	Clearwater Matrix	East	Inactive
8899002482	Insightpath Global	North	Inactive
8899002479	Edgecrest Consulting	North	Inactive

1 - 500 / 526 < >

Regional Head – Client Compliance Performance

Regional Head	Clients	Active Clients	Active ratio %
Anirban Sen	20	14	70%
Sanjay Kulkarni	98	69	70%
Sourav Chatterjee	183	146	80%
Debasis Mohanty	169	146	86%
Rajesh Verma	22	20	91%
Arvind Krishnan	20	19	95%
Central Office	1	1	100%
Amit Tiwari	7	7	100%
Venkatesh Rao	6	6	100%

Target

70%

80%

86%

91%

95%

100%

100%

100%

100%

Total Clients 526 428 81%

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

Dealing Mode – Client Compliance Performance

Dealing Mode	Clients	Active Clients	Active ratio %
Unclassified	32	6	19%
OMEGA	128	102	80%
PRIME	333	290	87%
VERTEX	33	30	91%

1 - 500 / 526 < >

Client activity effectiveness across engagement models

Monthly Onboarding Trend – Calendar Year Comparison

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	27	0	1
September	24	5	5	2	0
October	10	10	24	3	3
November	13	5	5	0	0
December	22	7	5	9	3

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.

Top 5 - Calendar Year / Client ID

1 - 500 / 526 < >

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	Debasis 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	Debasis Mohanty	Valid	NA	NA	NA

1 - 100 / 526 < >

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

Top 5 - Calendar Year / Client ID

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Client activity effectiveness across engagement models

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Client activity effectiveness across engagement models

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