



EXECUTIVE DASHBOARD

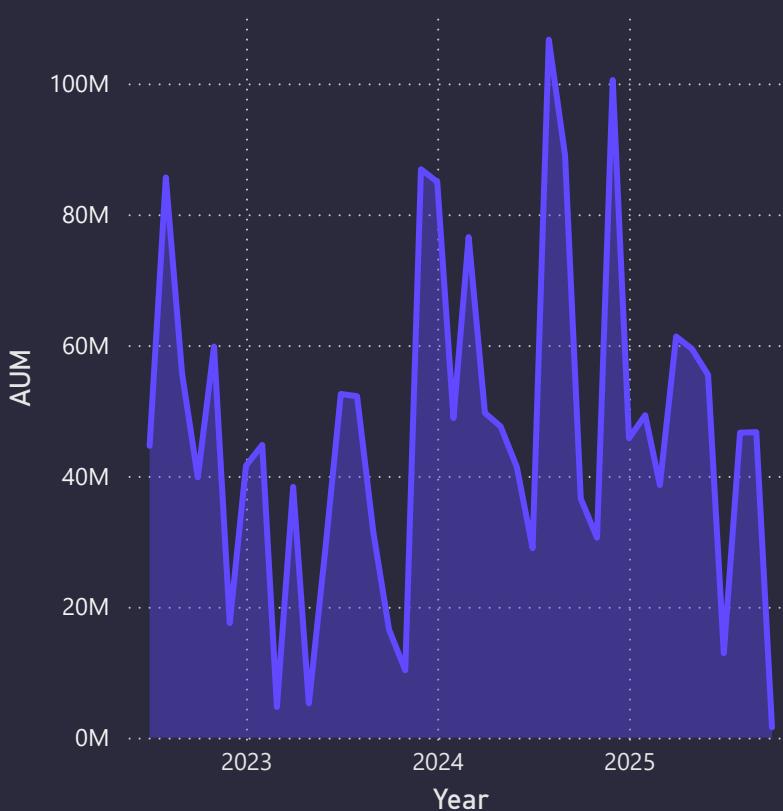
1.33bn

AUM

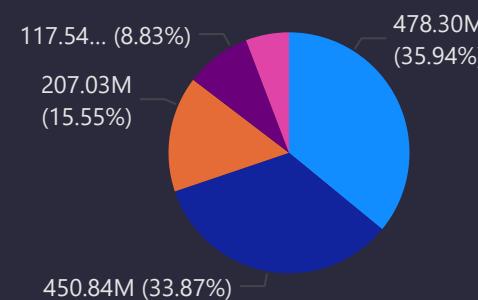
200

clients

AUM per month



AUM by city

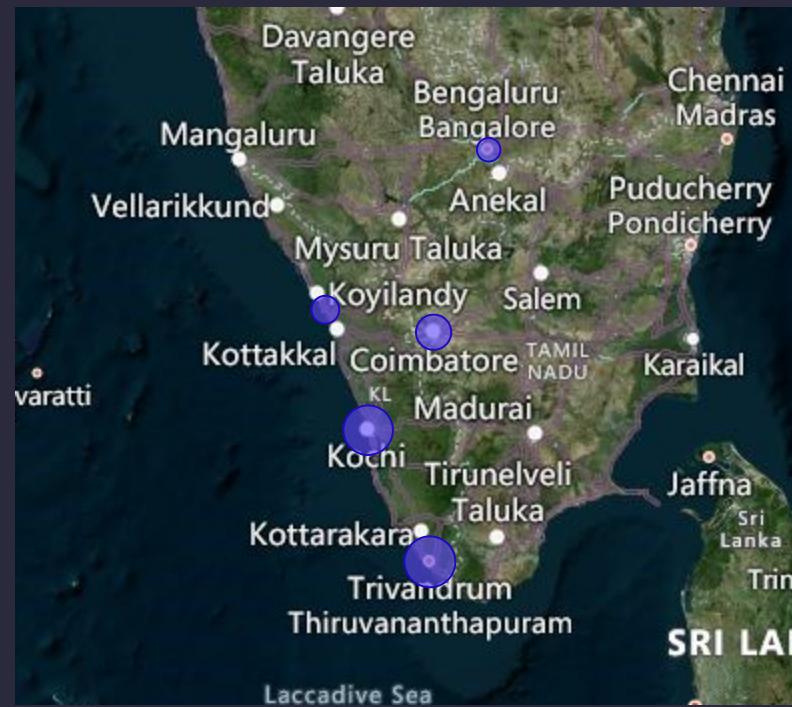


city
Thiruvananthapuram
Kochi
Coimbatore
Kozhikode
Bengaluru

Monetary x Recency Segments

| Monetary Segment | Active | Dormant | Occasional |
|------------------|--------|---------|------------|
| Medium Value | 45 | 11 | 2 |
| Low Value | 7 | 30 | 1 |
| High Value | 48 | 3 | 2 |

AUM and clients by city



AUM by Product Category





BRANCH DASHBOARD

Kochi

Branch

60

clients

450.84M

Branch AUM

25%

Reactivation rate

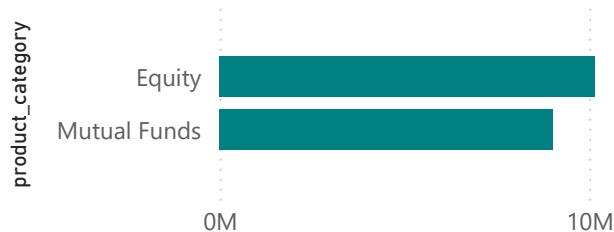
18%

Cross selling rate

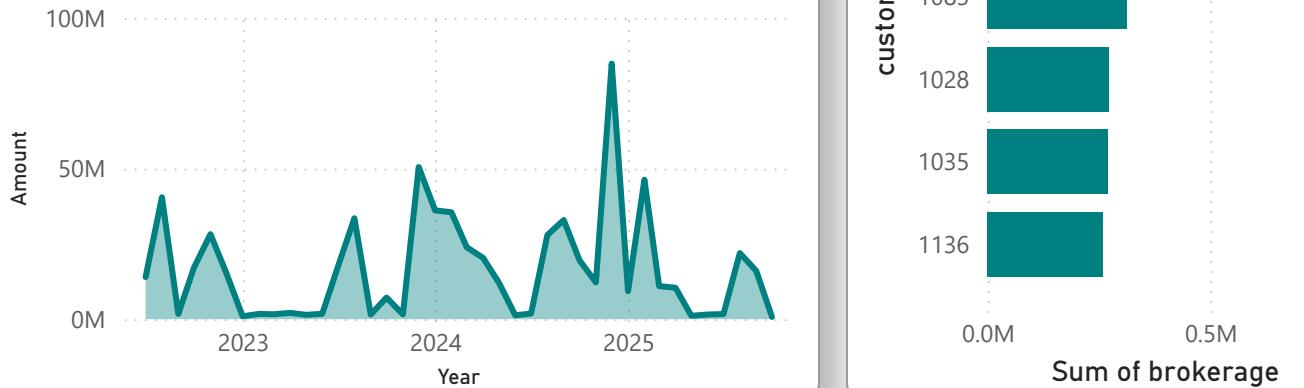
Top Priorities

| customer_id | customer_name | RFM Score | AUM | Opp. |
|--------------|----------------|-----------|---------------------|------|
| 1019 | Rahul Kumar | 0-0-0 | P0: | |
| 1076 | Senthil Rao | 0-0-0 | P0: | |
| 1114 | Kavya Pillai | 0-0-0 | P0: | |
| 1122 | Sidharth Reddy | 0-0-0 | P0: | |
| 1138 | Gokul Nair | 0-0-0 | P0: | |
| 1141 | Meera Rao | 0-0-0 | P0: | |
| 1170 | Anjali Reddy | 0-0-0 | P0: | |
| 1150 | Rahul Reddy | 1-3-5 | 15838760.00 | P1 - |
| 1003 | Suresh Pillai | 1-1-2 | 335259.00 | P2 - |
| 1055 | Arjun Kumar | 1-2-2 | 317808.00 | P2 - |
| 1154 | Arjun Pillai | 1-1-3 | 430927.00 | P2 - |
| 1004 | Vishnu Sharma | 3-4-4 | 13355756.00 | Star |
| Total | | | 450835223.00 | |

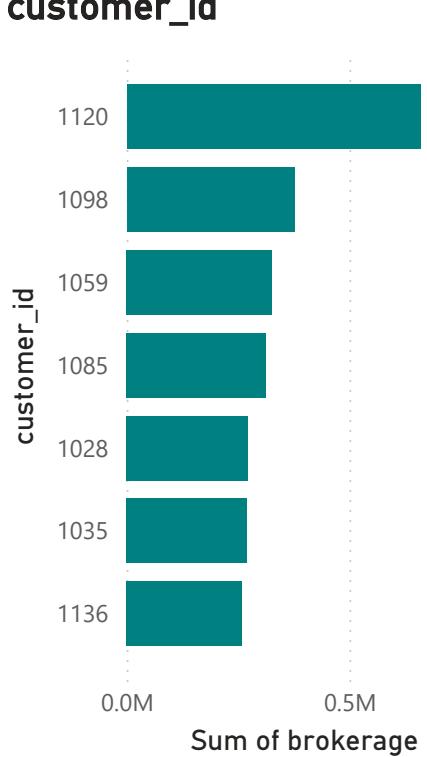
AUM by product_category



AUM by Year and Month



Sum of brokerage by customer_id





CUSTOMER DASHBOARD

Name

Suresh Pillai

AUM

11.44M

Branch

Kochi

Joined on

10-07-2020

Dormant days

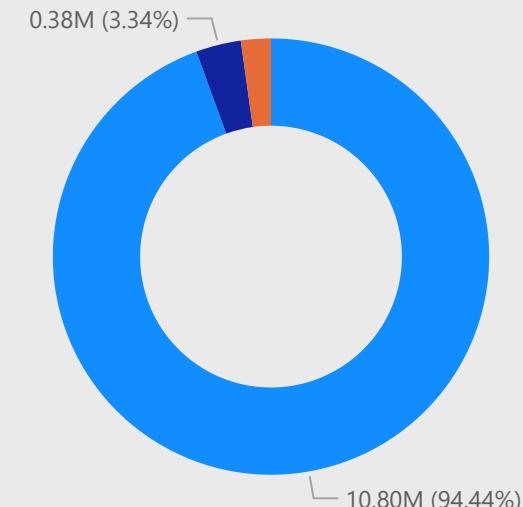
8

RFM Score

5-4-4

| product_id | Transaction | Amount | Date |
|------------|-------------|----------|------------|
| PMS01 | Buy | 164842 | 02-06-2024 |
| PMS01 | Sell | 455615 | 04-06-2024 |
| PMS01 | Buy | 91419 | 05-10-2025 |
| PMS01 | Buy | 151650 | 07-09-2025 |
| PMS01 | Buy | 33834 | 12-09-2022 |
| PMS01 | Sell | 10516 | 16-02-2025 |
| PMS01 | Buy | 181343 | 21-12-2022 |
| PMS01 | Buy | 38649 | 22-08-2022 |
| PMS01 | Buy | 186902 | 26-08-2024 |
| EQ01 | Sell | 153952 | 01-03-2025 |
| Total | | 12765598 | |

Holdings



- product_id
● PMS01
- EQ01
- MF01