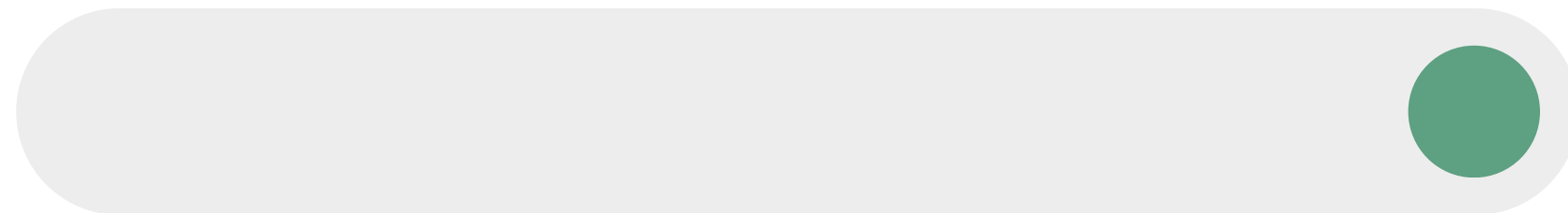




Fund Investment Platform





Agenda

- Introduction
- Scope
- Functional Requirements
- Merits & Demerits
- Conclusion
- Future Scope

1

Introduction

- Fund Investment Platform is intended to help user to keep account of his/her money invested at Bank , Post-office , Mutual Funds and Stock Market.
- Basically Investment is an asset that is created with the intention of helping your wealth to grow with time and secure your future financial requirements.
- Funds are used by individuals,businesses and government to set apart money. Individuals can set up emergency fund,Pension Fund etc. to cover unexpected expenses or a trust fund to save money for specific individuals.
- This specification will direct people and help to invest through application and will work step by step in the process until they finish it successfully.



2

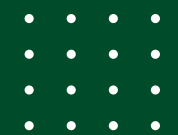
Scope

Investors can select from various types of mutual funds based on their investment objectives and risk tolerance levels.

The scope of investment analysis covers various aspects of an investment, including financial, economic, and market conditions and User Authentication.

Key Features :

- Add Investment
- Select Investment
- Select Sub-Investment
- View Portfolio
- Log Out





3

Functional Requirements

Investors can select from various types of investment methods .

The Brief description :

- User Satisfaction: The system is such that it stands up to the user expectations.
- Response Time: The response of all operations is good.
- Error Handling: Response to user errors and undesired situation has been taken care of to ensure that the system operates without halting.
- Safety and Robustness: The system is able to avoid or tackle disastrous action. In other words, it should be fool proof.
- Portable: The software should not be architecture specific. It should be easily transferable to other platforms if needed.
- User Friendliness: The system is easy to learn and understand. A native user can also use the system effectively, without any difficulties



4

Merits & Demerits

Merits

- Diversification & Risk Management :Helps investors choose funds based on their risk appetite.
- Retirement Planning (NPS) : Pre-Retirement Planning can be done
- Risk Management
- Tax Benefits
- Occasionally Saving

Demerits

- Market Risks: Mutual funds are not risk-free.
- Expense Ratios: Every mutual fund comes with costs like expense ratios and management fees.
- No Control Over Investments:
- Lock-In Periods:
- Unpredictable Returns: No Guaranteed Growth.



5

Conclusion

A Fund Investment Platform enables users to invest, manage, and track their investments efficiently.

Below are the key functional requirements categorized for clarity:

- User Registration
- User Login ID
- Fund Selection
- Recurring Investment (SIP)
- Withdrawal and redemption (SWP)



6

Future Scope

1. AI & Machine Learning Integration

Personalized portfolio suggestions based on user behavior and market trends.

2. Blockchain & Smart Contracts:

- Secure Transactions - Blockchain can enhance transparency and security in fund transfers.
- Smart Contracts for Compliance – Automating regulatory processes and fraud prevention.

3. Expansion into Decentralized Finance (DeFi)

Offering new ways to earn passive income.

Cross-Border Investment Opportunities – Providing access to global financial products.





THANK
YOU