



@GumptionLabs, We help advisors to
make managing and monitoring
Investments super easy through our
Automated Digital platform



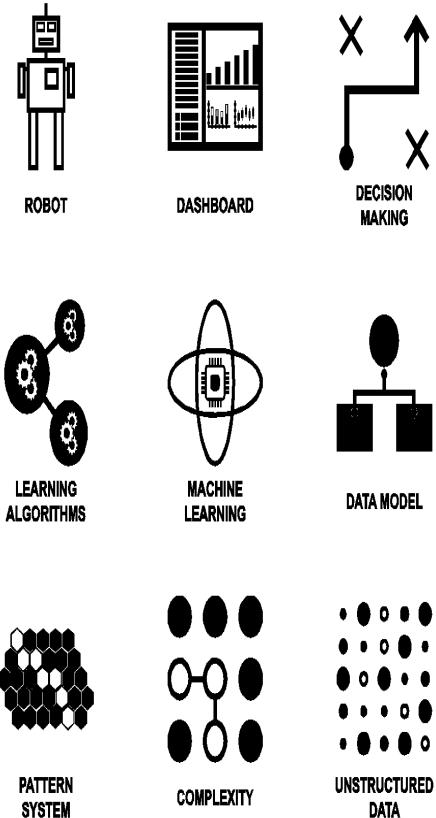
Problem For Large Advisors

- Most of the RMs do not have the total 360 degree Portfolio view of the Clients.
- Most RMs energy is spent on marketing for new investments/new clients and spend very little time for monitoring of existing investments



Solution

Automation through Technology alone can solve these issues due to the SCALE and Enormous Data Involved.



Automated Digital Platform
which

Auto Aggregates,
Auto Monitors
And
Auto Reports



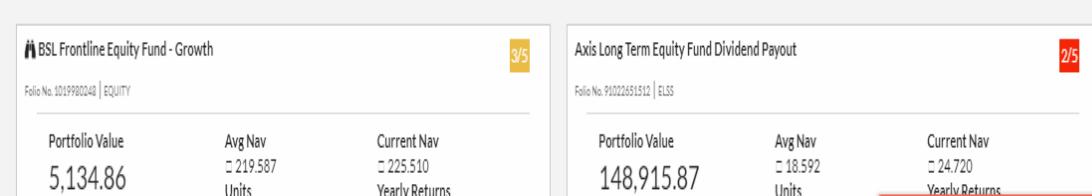
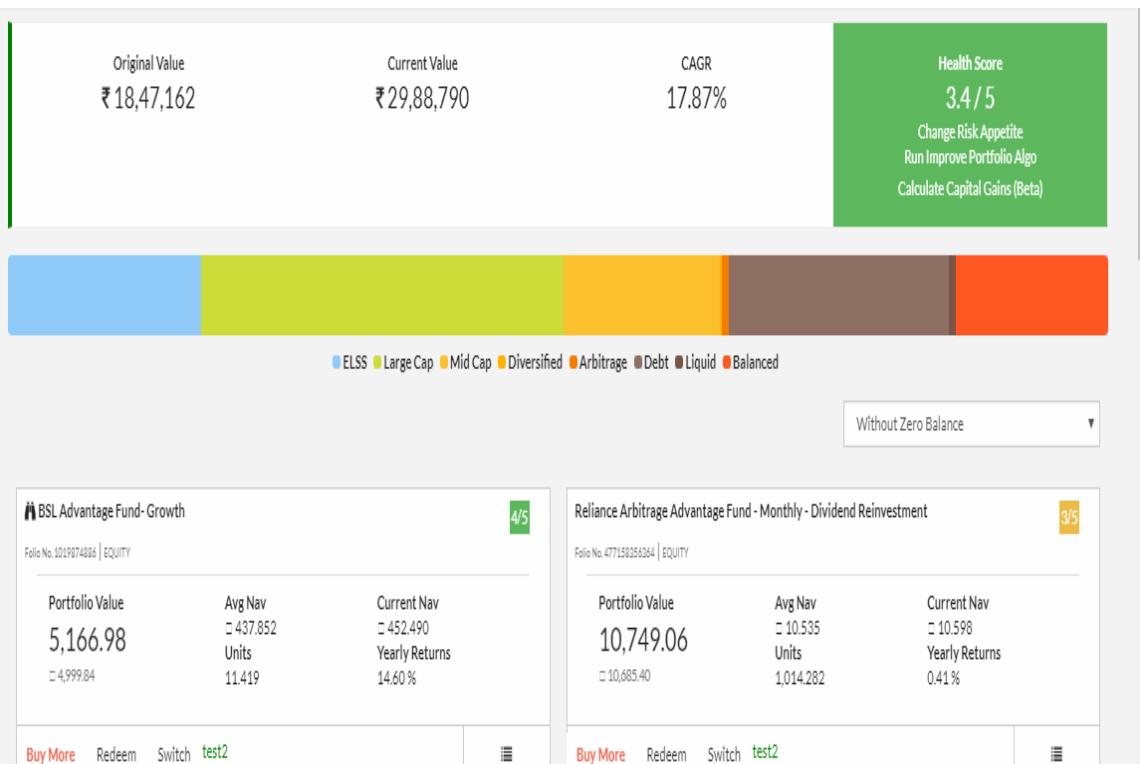
Why FundExpert ?

Because it is S.M.A.R.T.

Smart Modules Automated to manage
Risk/reTurns

Module 1 - SMART Portfolio Organizer

 **FUNDEXPERT**



Our SMART Aggregation Engine



Auto-collect all Reports



DIGITAL Portfolio Dashboard



PORTFOLIO Health Score & Other details

So with few Clicks, we retrieve Complete Portfolio at One Place

AMIT SHARDA
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Fetch Portfolio

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% Save Taxes

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Calculators

Risk Profile

Portfolio

Original Value **₹ 8,16,551** Current Value **₹ 10,71,095** CAGR **12.48%** Health Score **3.1 / 5**

ELSS Large Cap Diversified Sector Arbitrage Debt Liquid Balanced

Without Zero Balance

UTI Hybrid Equity Fund - Growth Plan
Folio No. 577310709187 | BALANCED

Portfolio Value 8,074.60 ₹ 8,000.00	Avg Nav ₹ 166.476	Current Nav ₹ 168.028
	Units 48.055	Yearly Returns 1.36 %
		Current NAV Date 20-06-2018

[Buy More](#) [Redeem](#) [Switch](#) [Existing Goals](#) [☰](#)

HDFC Hybrid Equity Fund - Direct Plan - Growth Option
Folio No. 2562174/49 | EQUITY

Portfolio Value 102,329.67 ₹ 102,811.54	Avg Nav ₹ 52.914	Current Nav ₹ 52.666
	Units 1,942.993	Yearly Returns -8.22 %
		Current NAV Date 20-06-2018

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It takes 2 minutes & 3 easy steps to consolidate your portfolio

Start now to organize your equity and mutual fund portfolios in one place and keep track of their performance

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1 Personal Details

2 Select Asset Class

3 Upload related PDF

 Your Email ID PAN Card No.[Proceed](#)

Why Consolidate Portfolios?



NIFTY: 11335.00 ▲ 33.80 (0.30%)

SENSEX: 37732.46 ▲ 196.80 (0.52%)

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Why Consolidate Portfolios?



Access the performance of all your asset classes at one place

This first-of-its-kind service allows you to view all your portfolios in one single document, instead of logging on to various web portals.



Track all portfolios to take more informed decisions

Being able to track all your portfolios and their ROLs in one single document gives you a rather holistic perspective of your investments.



Optimize all your portfolios and boost your ROL in a single click

Maximizing your returns is not as complex anymore. In fact, now you can mitigate your risks and maximize your returns.

Feedback

NIFTY: 11347.55 ▲ 46.35 (0.41%)

SENSEX: 37774.81 ▲ 239.15 (0.64%)

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Numbers



NIFTY: 11348.45 ▲ 47.25 (0.42%)

SENSEX: 37780.26 ▲ 244.60 (0.65%)

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Feedback

Welcome to VFS Global

NIFTY: 11348.85 ▲ 47.65 (0.42%)

SENSEX: 37782.38 ▲ 246.72 (0.66%)

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✓ Mutual Fund ↗

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Why Consolidate Portfolios?

Consolidated Account Statement - CAMS Mailback Request

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Sun, Mar 10, 10:13 PM (3 days ago)



Scheme Mergers and Scheme Name changes by Mutual Funds

Mutual funds in India have been mandated by SEBI to re-categorize and harmonize their existing schemes. The objective of this exercise is to eliminate multiple scheme offerings in the same category (by a given fund house) and to adopt a uniform system of scheme categorization across the industry. Pursuant to this, Mutual funds have renamed certain schemes in order to meet SEBI's requirement. Additionally they have merged some of their schemes whereby an existing scheme would have been merged into another similar scheme. It is possible that schemes you have invested in may have undergone either a name change or a merger. Please visit www.camsonline.com for details on schemes that have merged or have undergone a name change. Please note that in respect of scheme mergers the original investment value in the erstwhile scheme (scheme which has got merged) is considered for the purpose of determining cost value.

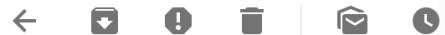
CONSOLIDATED ACCOUNT STATEMENT - CAMS + Karvy + FTAMIL + SBFS

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NIFTY: 11348



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Vilcap letter.pdf	500 KB	Yesterday at 11:32 PM	Yesterday at
ViiCap_Investment_Confirm_FYE...re Solutions Private Limited (1).pdf	104 KB	Yesterday at 11:06 PM	Yesterday at
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Mutual Fund ↗

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Why Consolidate Portfolios?

NIFTY: 11348.40 ▲ 47.20 (0.42%)

SENSEX: 37773.45 ▲ 237.79 (0.63%)

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Mutual Fund ↗



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Why Consolidate Portfolios?



NIFTY: 11343.70 ▲ 42.50 (0.38%)

SENSEX: 37766.54 ▲ 230.88 (0.62%)

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What are you looking for?



Good things come to those who wait..
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NIFTY: 11338.85 ▲ 37.65 (0.33%)

SENSEX: 37751.26 ▲ 215.60 (0.57%)

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Equity ↗

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⌚ Wed, Feb 13, 4:41 PM



Consolidated Account Statement

Demat of Mutual Fund Units

BE A SMART INVESTOR



HOLD YOUR MUTUAL FUND UNITS IN DEMAT

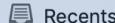
It is simple, safe, fast and accessible at your convenience.

NIFTY: 11338

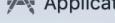


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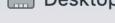
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Why Consolidate Portfolios?



NIFTY: 11338.65 ▲ 37.45 (0.33%)

SENSEX: 37751.86 ▲ 216.20 (0.58%)

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Equity ✉



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Feedback

NIFTY: 11343.70 ▲ 42.50 (0.38%)

SENSEX: 37766.54 ▲ 230.88 (0.62%)

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NIFTY: 11341.75 ▲ 40.55 (0.36%)

SENSEX: 37767.57 ▲ 231.91 (0.62%)

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Your Consolidated Portfolio

Here you can track the performance of your Equity & Mutual Fund portfolios, all at once place

Last uploaded date 13 Mar, 2019

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Consolidated Portfolio Overview : ₹ 33,74,025.00

Equity Portfolio

Update/Re-upload

Current Value (₹)

22,75,280.30

Market Cap Breakup



● 67.6%
LARGE

● 23.2%
MEDIUM

● 9.2%
SMALL

Mutual Fund Portfolio

Update/Re-upload

Current Value(% Returns) (₹)

10,98,744.70 (3.69%)

Investment Value (₹)

10,59,666.00

Realised Gain / Loss (%) (₹)

14,42,818.00 (131.50%)

Unrealised Gain / Loss (%) (₹)

-14,03,739.30 (-127.81%)

Investment Style
Moderate

Investment Horizon
Medium Term

Investment Preferences
Large Cap

Category Breakup



● 14.5%
● 85.6%

Feedback



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BUY /
SELL /
LARGE /
MEDIUM /
SMALL

Moderate

Medium Term

Large Term

Category Breakup

• 14.5%
EQUITY • 85.5%
DEBT

Individual Records

EQUITY

MUTUAL FUNDS

Group by

MF scheme



♦ Scheme Name
AMC Name

Broker
AMC

♦ Scheme Category
Broker Name

♦ Current Value (₹)
Current NAV

♦ Investment Val (₹)
Avg. Purchase NAV

♦ Units
Yearly Returns %

♦ Gain / Loss

Aditya Birla SL Equity Advantage Fund (G)

EQUITY | LARGE & MID ...

1,135.37

1,000.00

2.81

135.37

Individual Records

EQUITY

MUTUAL FUNDS

Group by

MF scheme
MF scheme
Broker
AMC



♦ Scheme Name

AMC Name

♦ Scheme Category

Broker Name

♦ Current Value (₹)

Current NAV

♦ Investment Val (₹)

Avg. Purchase NAV

♦ Units

Yearly Returns %

♦ Gain / Loss

Aditya Birla SL Equity Advantage Fund (G)

Aditya Birla Sun Life Mutual Fund

EQUITY | LARGE & MID ...

1,135.37

1,000.00

2.81

135.37



404.19

356.00

-5.01%

Aditya Birla SL Equity Fund (G)

Aditya Birla Sun Life Mutual Fund

EQUITY | MULTI CAP

0.00

0.00

0.00

0.00



Anuraag Saboo (ARN-13974)

729.22

0.00

0.76%

Aditya Birla SL Frontline Equity Fund (G)

Aditya Birla Sun Life Mutual Fund

EQUITY | LARGE CAP

0.00

0.00

0.00

0.00



Anuraag Saboo (ARN-13974)

226.19

0.00

3.89%

Aditya Birla SL Liquid Fund - Direct (G)

Aditya Birla Sun Life Mutual Fund

DEBT | LIQUID

52,190.51

50,000.00

174.38

2,190.51



Direct Scheme (INA200008714)

299.3004

286.74

7.60%

Aditya Birla SL Short Term Opportunities (G)

Aditya Birla Sun Life Mutual Fund

DEBT | SHORT DURATI...

0.00

0.00

0.00

0.00



Anuraag Saboo (ARN-13974)

30.9129

0.00

7.46%

Aditya Birla SL Tax Plan (D)

Aditya Birla Sun Life Mutual Fund

EQUITY | ELSS

0.00

0.00

0.00

0.00



ICICI Securities Limited (ARN-0845)

88.7

0.00

-2.47%

Aditya Birla Sun Life Freedom Fund - Dividen...

Aditya Birla Sun Life Mutual Fund

EQUITY | DIVERSIFIED

0.00

0.00

0.00

0.00



ICICI Securities Limited (ARN-0845)

0

0.00

0.00%

Aditya Birla Sun Life Freedom Fund - Growth

Aditya Birla Sun Life Mutual Fund

EQUITY | DIVERSIFIED

0.00

0.00

0.00

0.00





Individual Records

EQUITY

MUTUAL FUNDS

Group by

MF scheme



Scheme Name AMC Name	Scheme Category Broker Name	Current Value (₹) Current NAV	Investment Val (₹) Avg. Purchase NAV	Units Yearly Returns %	Gain / Loss	
Aditya Birla SL Equity Advantage Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE & MID ... Anuraag Saboo (ARN-13974)	1,135.37 404.19	1,000.00 356.00	2.81 -5.01%	135.37	
Aditya Birla SL Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY MULTI CAP Anuraag Saboo (ARN-13974)	0.00 729.22	0.00 0.00	0.00 0.76%	0.00	
Aditya Birla SL Frontline Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE CAP Anuraag Saboo (ARN-13974)	0.00 226.19	0.00 0.00	0.00 3.89%	0.00	
Aditya Birla SL Liquid Fund - Direct (G) Aditya Birla Sun Life Mutual Fund	DEBT LIQUID Direct Scheme (INA200008714)	52,190.51 299.3004	50,000.00 286.74	174.38 7.60%	2,190.51	
Aditya Birla SL Short Term Opportunities (G) Aditya Birla Sun Life Mutual Fund	DEBT SHORT DURATI... Anuraag Saboo (ARN-13974)	0.00 30.9129	0.00 0.00	0.00 7.46%	0.00	
Aditya Birla SL Tax Plan (D) Aditya Birla Sun Life Mutual Fund	EQUITY ELSS ICICI Securities Limited (ARN-0845)	0.00 88.7	0.00 0.00	0.00 -2.47%	0.00	
Aditya Birla Sun Life Freedom Fund - Dividen...	EQUITY DIVERSIFIED ICICI Securities Limited (ARN-0845)	0.00 0	0.00 0.00	0.00 0.00%	0.00	
Aditya Birla Sun Life Freedom Fund - Growth	EQUITY DIVERSIFIED	0.00	0.00	0.00	0.00	

Individual Records

EQUITY

MUTUAL FUNDS

Group by

Broker



Scheme Name AMC Name	Scheme Category Broker Name	Current Value (₹) Current NAV	Investment Val (₹) Avg. Purchase NAV	Units Yearly Returns %	Gain / Loss
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ICICI SECURITIES LIMITED (ARN-0845) (13 SCHEMES | ₹0.00)

Reliance Growth Fund - (G) Reliance Mutual Fund	EQUITY MID CAP ICICI Securities Limited (...	0.00 1,114.76	0.00 0.00	0.00 -2.51%	0.00
IDFC Large Cap Fund (G) IDFC Mutual Fund	EQUITY LARGE CAP ICICI Securities Limited (...	0.00 32.59	0.00 0.00	0.00 4.47%	0.00
ICICI Pru Bluechip Fund (G) ICICI Prudential Mutual Fund	EQUITY LARGE CAP ICICI Securities Limited (...	0.00 42.52	0.00 0.00	0.00 5.98%	0.00
ICICI Pru Value Discovery Fund (G) ICICI Prudential Mutual Fund	EQUITY VALUE ICICI Securities Limited (...	0.00 146.37	0.00 0.00	0.00 1.49%	0.00
HDFC Top 100 Fund (G) HDFC Mutual Fund	EQUITY LARGE CAP ICICI Securities Limited (...	0.00 502.47	0.00 0.00	0.00 13.47%	0.00
HDFC Tax Saver Fund (G) HDFC Mutual Fund	EQUITY ELSS ICICI Securities Limited (...	0.00 527.88	0.00 0.00	0.00 3.34%	0.00
HDFC Money Market Fund (G)	DEBT MONEY MARKET	0.00	0.00	0.00	0.00

ADITYA BIRLA SUN LIFE MUTUAL FUND(9 SCHEMES | ₹53,325.88)

Aditya Birla SL Liquid Fund - Direct (G) Aditya Birla Sun Life Mutual Fund	DEBT LIQUID Direct Scheme (INA2000...)	52,190.51 299.30	50,000.00 286.74	174.38 7.60%	2,190.51	
Aditya Birla SL Short Term Opportunities (G) Aditya Birla Sun Life Mutual Fund	DEBT SHORT DURATION Anuraag Saboo (ARN-13...)	0.00 30.91	0.00 0.00	0.00 7.46%	0.00	
Aditya Birla SL Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY MULTI CAP (ARN-117507)	0.00 729.22	0.00 0.00	0.00 0.76%	0.00	
Aditya Birla SL Frontline Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE CAP (ARN-117507)	0.00 226.19	0.00 0.00	0.00 3.89%	0.00	
Aditya Birla SL Equity Advantage Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE & MID CAP Anuraag Saboo (ARN-13...)	1,135.37 404.19	1,000.00 356.00	2.81 -5.01%	135.37	
Aditya Birla SL Equity Advantage Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE & MID CAP Anuraag Saboo (ARN-13...)	0.00 404.19	0.00 0.00	0.00 -5.01%	0.00	
Aditya Birla SL Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY MULTI CAP Anuraag Saboo (ARN-13...)	0.00 729.22	0.00 0.00	0.00 0.76%	0.00	
Aditya Birla SL Frontline Equity Fund (G) Aditya Birla Sun Life Mutual Fund	EQUITY LARGE CAP Anuraag Saboo (ARN-13...)	0.00 226.19	0.00 0.00	0.00 3.89%	0.00	
Aditya Birla SL Tax Plan (D) Aditya Birla Sun Life Mutual Fund	EQUITY ELSS ICICI Securities Limited (...)	0.00 88.70	0.00 0.00	0.00 -2.47%	0.00	

AXIS MUTUAL FUND(3 SCHEMES | ₹1,10,682.10)



Individual Records

EQUITY

MUTUAL FUNDS

Group by

Stock

Stock

Broker



▲ Stock Name LTP	▲ Symbol ISIN	▲ Value (₹)	▲ Quantity	▲ Market Cap	▲ Broker Name
Adani Ports & Special Economic Zone Ltd 391.75	ADANIPORTS INE742F01042	391.75	1	LARGE CAP	COMPOSITE INV...
Aditya Birla Fashion & Retail Ltd 210.30	ABFRL INE647001011	1,051.50	5	MID CAP	ZERODHA SECU...
Allahabad Bank 49.15	ALBK INE428A01015	49.15	1	SMALL CAP	COMPOSITE INV...
Ashok Leyland Ltd 88.50	ASHOKLEY INE208A01029	177.00	2	LARGE CAP	COMPOSITE INV...
Asian Paints Ltd 1,448.75	ASIANPAINT INE021A01026	1,448.75	1	LARGE CAP	ZERODHA SECU...
Aurobindo Pharma Ltd 831.15	AUROPHARMA INE406A01037	55,687.05	67	LARGE CAP	TRADEJINI FINA...
Bajaj Auto Ltd 3,044.65	BAJAJ-AUTO INE917I01010	66,982.30	22	LARGE CAP	ZERODHA SECU...



SHAREKHAN LIMITED(5 STOCKS | ₹71,134.10)

Bharat Heavy Electricals Ltd 71.25	BHEL INE257A01026	2,636.25	37.00	MID CAP
Reliance Communications Ltd 1.90	RCOM INE330H01018	9.50	5.00	SMALL CAP
Reliance Power Ltd 7.35	RPOWER INE614G01033	7.35	1.00	MID CAP
Reliance Industries Ltd 1,392.80	RELIANCE INE002A01018	27,856.00	20.00	LARGE CAP
State Bank of India 312.50	SBIN INE062A01020	40,625.00	130.00	LARGE CAP

COMPOSITE INVESTMENTS PRIVATE LIMITED (21 STOCKS | ₹14,132.50)

Dish TV India Ltd 36.15	DISHTV INE836F01026	36.15	1.00	MID CAP
UPL Ltd 970.35	UPL INE628A01036	1,940.70	2.00	LARGE CAP
Cipla Ltd 567.95	CIPLA INE059A01026	567.95	1.00	LARGE CAP
Sun TV Network Ltd	SUNTV	574.80	1.00	MID CAP



SEARCH MUTUAL FUNDS

VERIFYING DOCUMENTS

KYC APPROVED



0731-4797263

REACH US



SOURABH BAJAJ



START INVESTING

INVEST NOW

RE-CHECK YOUR RISK APPETITE



Risk Profiling

AGGRESSIVE - You can take high risk. Put about **90%** into **Equity Funds** and **10%** into **Debt Funds**. This can mean notional losses in short to medium terms but long term picture is bountiful.

Our SMART Risk Analyser Engine



Analyzes users Risk Profile based on Investment History and Client Data
And
Analyzes the entire Investment universe available to users
And

Auto recommends Investment Options/Thematic Investment Baskets as per his current portfolio and Risk Profile

AMIT SHARDA
[Logout](#)

[START INVESTING](#)

- [Dashboard](#)
- [Manage Portfolio](#)
 - [Fetch Portfolio](#)
 - [Upload Portfolio](#)
- [Orders & SIP](#)
- [Goals NEW](#)
- [% Save Taxes](#)
- [Register Mandates](#)
- [Register FATCA](#)
- [Calculators](#)
- [Risk Profile](#)

Robo Invest Basket

[SELECT YOUR OWN](#)

Amount ₹ Frequency Risk Appetite

ROBO INVEST BASKET			
5/5	FRANKLIN INDIA SMALLER COMPANIES FUND-GROWTH	₹ 6000	<input type="button" value="Edit"/>
Equity Small Cap Growth			
5/5	HDFC EQUITY FUND - GROWTH OPTION	₹ 7000	<input type="button" value="Edit"/>
Equity Diversified Growth			
4/5	DSP BLACKROCK CREDIT RISK FUND - REGULAR PLAN - GROWTH	₹ 1000	<input type="button" value="Edit"/>
Debt Long Term Growth			
4/5	KOTAK INDIA EQ CONTRA FUND-GROWTH	₹ 6000	<input type="button" value="Edit"/>

Your Growth in 3 Years

Basket Growth ₹28640	Basket CAGR 12.72 %
FD Growth ₹24500	FD CAGR 7.0 %
Invested Amount ₹20000	

[BUY](#)
Select your own Mutual Fund

Though user still can override the choices by editing the choices in the Cart Functionality

The screenshot shows the MF PLANET website interface. On the left, there's a sidebar with user profile information (Amit Sharda), navigation links (Dashboard, Manage Portfolio, Fetch Portfolio, Upload Portfolio, Orders & SIP, Goals), and a 'START INVESTING' button. The main area has a search bar ('SEARCH MUTUAL FUNDS') and a top navigation bar with 'KYC APPROVED', a shopping cart icon, a house icon, a phone number (0731-4797263), and a 'REACH' button.

Your Cart

ROBO INVEST BASKET

One Time

5/5 HDFC EQUITY FUND - GROWTH OPTION ₹ 5000 Edit X

Equity | Diversified | Growth

5/5 HDFC BALANCE ADVANTAGE FUND - REGULAR PLAN - GROWTH ₹ 5000 Edit X

Equity | Large Cap | Growth

BUY

Select more Mutual Funds

Popular

Home Educational Events Adventure Sports Vacation Occasion Auto-Mobile



Wealth Creation



Funding For Startup



Emergency Fund



Holiday Planning



Build My Home



Higher Education



Dream Car



Dream Bike

Goal Adviser Engine



Links to Goals existing
Portfolio and Tracks and
Monitor the
progress of Your Financial
Goals

Creating the Goals

STEP 1: SELECT YOUR DESIRED GOALS FROM THE MENTIONED CATEGORIES

Popular Home Educational Events Adventure Sports Vacation Occasion Auto-Mobile

Premier Graduation India Premier Graduation Abroad Premier Post Graduation India Premier Post Graduation Abroad

STEP 2: FILL IN ANY EXTRA DETAILS BELOW, CALCULATE AND SUBMIT

SET A GOAL

Enter details

Category: Educational
Goal Name: Premier Graduation Abroad
Years: 5
Total Goal Amount: 3000000
Available Amount: 0

CALCULATE

TO ACCOMPLISH YOUR TARGET, YOU WILL NEED TO INVEST
₹33082
MONTHLY FOR 5 YEARS
GOAL TARGET ₹ 30.00 Lac IN 5YEARS
CAGR / Returns 15 %

SUBMIT CLOSE

Funds Auto-linked to Accomplish Goals

STEP 3: GET TO KNOW WHICH FUNDS CAN HELP YOU ACHIEVE YOUR GOAL

TO ACCOMPLISH YOUR GOAL "PREMIER GRADUATION ABROAD" YOU WILL NEED TO INVEST ₹33082 MONTHLY FOR 5 YEARS,
GOAL TARGET ₹ 3000000 IN 5 YEARS
Available Amount to invest in one time is 0.
Total Goal Amount is 3000000

ROBO INVEST BASKET				
5/5	ICICI PRUDENTIAL NIFTY NEXT 50 INDEX FUND - GROWTH	₹ 11082	edit	x
4/5	RELIANCE SMALL CAP FUND - GROWTH PLAN - GROWTH OPTION	₹ 8000	edit	x
5/5	L&T SHORT TERM INCOME FUND - GROWTH	₹ 1000	edit	x
5/5	BOI AXA CORPORATE CREDIT SPECTRUM FUND - REGULAR PLAN - GROWTH	₹ 2000	edit	x
5/5	IDFC FOCUSED EQUITY FUND-REGULAR PLAN-GROWTH	₹ 11000	edit	x



Track Your Goals

Your Goals



Premier Graduation Abroad

Goal Amount
₹ 3000000

Goal Expiry
04/12/2022

Available Amount
₹ 0

[DELETE](#)

Amount Achieved : 0.000

Dream Bike

Goal Amount
₹ 400000

Goal Expiry
16/03/2021

Available Amount
₹ 0

[DELETE](#)

Amount Achieved : 0.000

Wealth Creation

Goal Amount
₹ 10000000

Goal Expiry
29/12/2037

Available Amount
₹ 0

[DELETE](#)

Amount Achieved : 4,923.102

Emergency Fund

Goal Amount
₹ 500000

Goal Expiry
16/03/2019

Available Amount
₹ 0

[DELETE](#)

Amount Achieved : 0.000

 **Family Accounts**[Add Account](#)[Linked Accounts](#)[Master Accounts](#)[Link Requests](#)

Manage Family Accounts
and Family Goals



Monitor and Manage At one
Place



Combines
User Tracking Engine,
Chat Bot Adviser Engine
And CRM

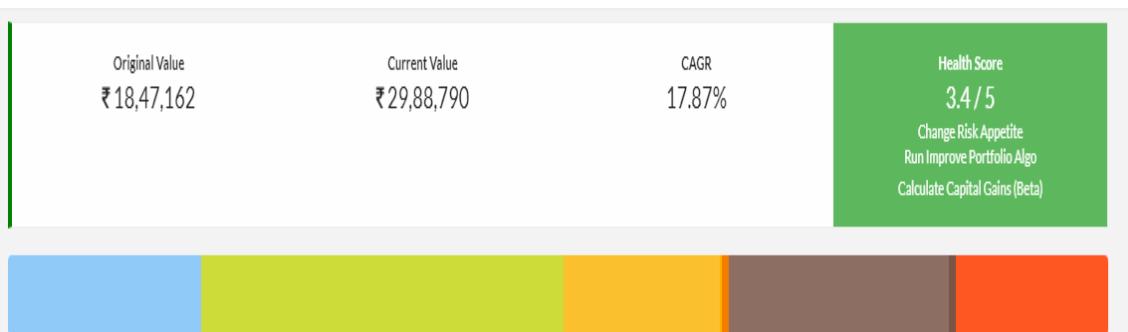


Will trigger timely alerts to
concerned Sales/support
Team



Also Available 24/7 to give
personalised help to user

Module 5 - SMART Portfolio Reporter



BSL Advantage Fund- Growth			4/5
Folio No. 1019074888 EQUITY			
Portfolio Value 5,166.98	Avg Nav ₹ 437.852	Current Nav ₹ 452.490	
Units 11,419	Yearly Returns 14.60 %		
Buy More	Redeem	Switch	test2

Reliance Arbitrage Advantage Fund - Monthly - Dividend Reinvestment			3/5
Folio No. 477158356364 EQUITY			
Portfolio Value 10,749.06	Avg Nav ₹ 10.535	Current Nav ₹ 10.598	
Units 1,014.282	Yearly Returns 0.41 %		
Buy More	Redeem	Switch	test2

BSL Frontline Equity Fund - Growth			3/5
Folio No. 1019980248 EQUITY			
Portfolio Value 5,134.86	Avg Nav ₹ 219.587	Current Nav ₹ 225.510	
Units Yearly Returns			

Axis Long Term Equity Fund Dividend Payout			2/5
Folio No. 91022651512 ELSS			
Portfolio Value 148,915.87	Avg Nav ₹ 18.592	Current Nav ₹ 24.720	
Units Yearly Returns			

Portfolio Report Generation Engine



Auto generates reports for the Adviser AUM and user Portfolios

ROBO ALERTS

Robo Alerts on your holdings in the last 90 days. Select a start date to view Robo Alerts generated on your portfolio.

Alerts From: SUBMIT

Get A Call Back

MutualFund	Email	Alert Date	Alert	Buy Subscription	Strategy
BSL Frontline Equity Fund - Growth	amitams@yahoo.com	2017-12-21	Buy	SUBSCRIBE	15
HDFC Mid-cap Opportunities Fund - Growth Option	amitams@yahoo.com	2017-10-25	Buy	?	15
ICICI Prudential Focused Bluechip Equity Fund - Growth	amitams@yahoo.com	2017-12-08	Buy	?	11

SUBSCRIBE TO ALL

Portfolio Optimizer Engine



Auto Understands Advisor's Inputs and Auto Monitors user Portfolio to



Auto Generate Actionable Report - thereby Rebalancing and Optimizing the Portfolio as per targeted frequency

Action on Alerts can also be triggered from Adviser view of Portfolio Dashboard

HDFC Top 100 Fund - Regular Plan - Growth

2/5

Folio No. 2562174/49 | EQUITY | Internal |

Portfolio Value
59,321.95
₹ 59,999.98

Avg Nav
₹ 448.803
Units
133.689

Current Nav
₹ 443.731
Yearly Returns
-3.53 %



[Buy More](#)

[Redeem](#)

[Switch](#)

[Existing Goals](#) ▾



L&T Low Duration Fund Fund Direct Plan - Growth

4/5

Folio No. 3354527/72 | DEBT | External |

Portfolio Value
104,172.28
₹ 100,000.00

Avg Nav
₹ 18.388
Units
5,438.329

Current Nav
₹ 19.155
Yearly Returns
5.60 %



[Buy More](#)

[Redeem](#)

[Switch](#)

[test](#)



Aditya Birla Sun Life Equity Advantage Fund - Growth-Regular Plan

4/5

Folio No. 1019874886 | EQUITY | Internal | ARN-117507

Portfolio Value
1,913.30
₹ 1,999.84

Avg Nav
₹ 429.150
Units
4.660

Current Nav
₹ 410.580
Yearly Returns
-3.93 %



[Buy More](#)

[Redeem](#)

[Switch](#)

[Existing Goals](#) ▾



UTI BANKING & PSU DEBT FUND - REGULAR PLAN - GROWTH

3/5

Folio No. 577310044174 | DEBT | Internal | ARN-112681

Portfolio Value
52,645.34
₹ 50,000.00

Avg Nav
₹ 13.596
Units
3,677.660

Current Nav
₹ 14.315
Yearly Returns
5.48 %



[Buy More](#)

[Redeem](#)

[Switch](#)

[Existing Goals](#) ▾



Auto-Monitoring Portfolio leads to Effective Customer Portfolio Management by

- Scaling the Quality Advisory through technology
- Ensuring the Advisory is timely implemented in most tax efficient manner
- Thereby Enhancing Portfolio returns and Reducing Volatility

We are a 25 Member Dedicated and Competent TEAM



Anuraag Saboo

BTECH, IIT Chennai Topper
MBA, IIM Bangalore & CMT, USA

MF Advisor since 2003

Drives the Algorithms Research and Customer Engagement

Amit Sharda

Comp Science Techie par Excellence

XLRI MBA Topper

Leads the Product Roadmap and technology team



Critical Advantages working with us

- Extensive experience in Domain
- Depth Of Algorithms (360 degree view)
- Quick Go to Market as all Modules are available
- Easy Integration/Deployment with APIs



OUR RECOGNITIONS

FinTechCity
home of The FinTech50



THOMSON REUTERS

 VillageCapital

Live Customers

Edelweiss

 StockHolding

CENTRUM



THANK YOU

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