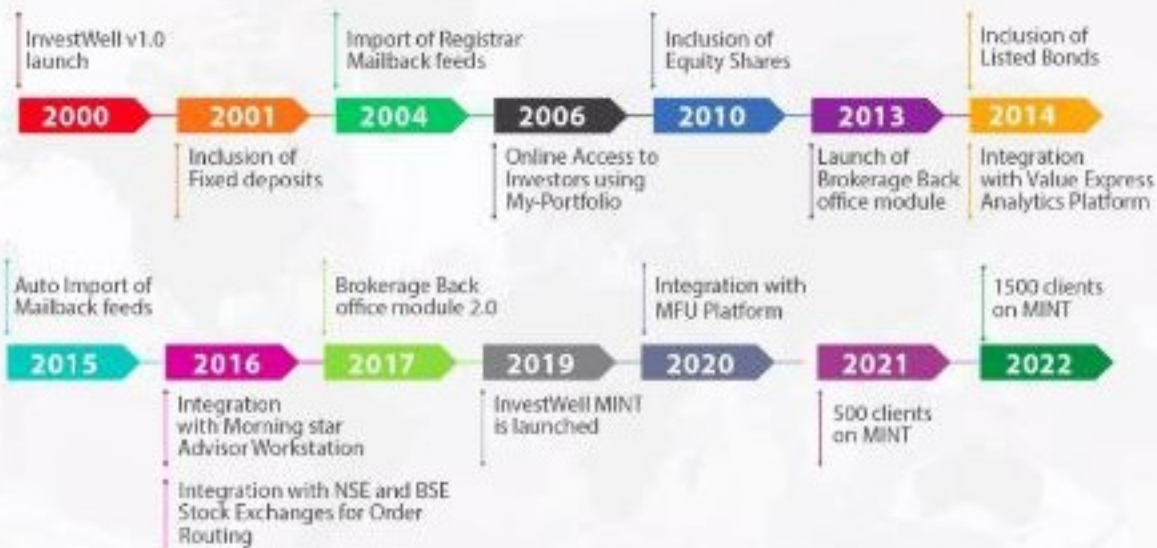


- Excel Net Solutions Private Limited, the parent company of Investwell software, came into existence in the year 2000.
- Since inception, we are proudly founder-led, bootstrapped and profitable.
- At our core, we are a product focused company.
- We are headquartered in Gurgaon (Haryana) with team-mates working from all across India.

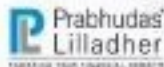
- Our vision is to **enable financial inclusion for all**, by accelerating **distribution of financial products** using technology.
- We do this by developing software products to enable financial advisory.
- Our product allows financial advisors to eliminate the complexity of finance for their investors, thereby increasing the productivity of financial advisors.
- Investwell is a common noun in the **mutual fund distribution industry** and is known for its **robustness** and **reliability** all over India.
- Our **Target Market** includes any entity which wishes to distribute financial products in the Indian market.

Our Journey

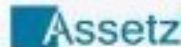


- 23+ years
- 5000+ wealth managers use Investwell
- More than 48+ Lakh investors
- 3.38 Lakh Cr assets under management (AUM)
- 418 cities
- 27 states
- 18k weekly mutual fund transactions through our platform
- 8k new investors onboarded through our platform every year
- 45k Daily Active Users on our platform

Our Clientele



SUNKERSETT



BLUE EDGE



The right Technology Partner like Investwell can help you identify issues you hadn't seen and solve problems you thought you had to live with. The best part of the relationship is that you can take advantage of advanced skills when and how you need them. I consider Investwell as bespoke tech expertise available whenever you need.



Amit Bivalkar

Senior Wealth Advisors & Brokers Private Limited
Pune

I have been using Investwell since 2007 and am happy to share the way Mr Jain & his team have evolved the software with the times. Investwell is a healthy combination of offline and online interface. It works without internet as the database resides on your system.



Abhinav Khetry

Vyana Wealth Management Private Limited
Kolkata

We at PurplePond have been using Investwell Mutual Fund reporting Software since 2014. NSE API Integration, Online Portfolio Viewer and Mobile Application have helped us scale up our business. The reports, particularly the Capital Gains Statement and Unrealized Capital Gain Report are the most sought after reports by our clients.



S Saravanan

PurplePond Financial Services
Chennai

I have known Sunil since I first hired him in 1995 for Food Income software in RR Financial. Since then our association with InvestWell has become stronger and stronger. They are creative and adaptable to new ideas without hesitation. Trustworthy, consistent, reliable and most competitive. Sometimes I feel that I could not have progressed without this support.



Mukesh Gupta

WC Securities Pvt Ltd
New Delhi

Ever since 2011, We have signed up with InvestWell. We are very happy of their services, year after year with continued improvement blended with latest technology that too with affordable cost. Even more so happy are our clients.



E. Chandrasekaran
ECS FINANCIAL SERVICES (INDIA) PVT. LTD
Hyderabad

I am been using this software since 12 years. I think it is the most complete software for a professional to manage all financial products at single place. I have the seen the developmental journey of this software.



Anil Jondhe
Finance Doctor
Nagpur

I have used Jain saba's software since 2000 when technology was an after word. It has helped us scale up our business from a handful of clients to a few thousand and serve them well. Jain saba,



Maj Ashish Chadha
Chadha Investment
New Delhi

Perfect blend of customer satisfaction and technical expertise. Thanks Investwell for your continued efforts in bringing the latest in portfolio reporting for our clients.



Dilshad Billimoria
Dilger Consultants Private Limited
Nagpur

1st to handle industry changes & requirements

- Scheme Mergers, Grandfathering of gains
- Segregation, Change of Broker cases
- Redemption Simulator
- CAS import
- Brokerage auto import & Analysis
- Covers MF (Regular & Direct), Shares, Bonds, FD's, PMS, AIF, Other Assets
- Integrated with MFU, NSE and BSE
- Efficient, Accurate, Reliable & Affordable



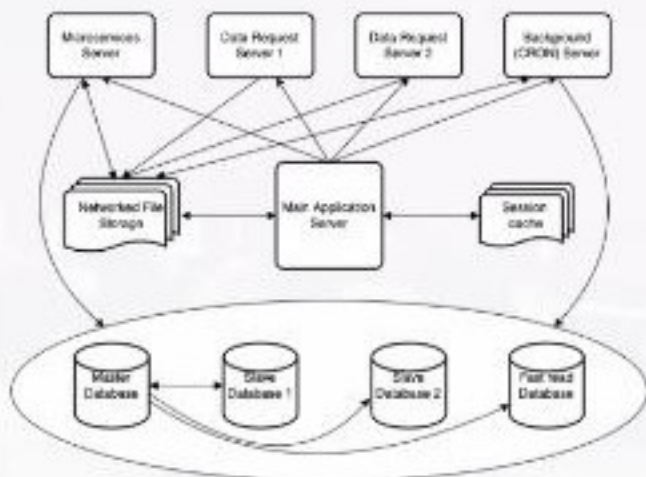




elasticsearch



- Multi-server distributed architecture, optimized for scale and performance.
- Databases home to > 700GB of secure financial data.
- Application monitored 24x7 to ensure top notch user experience.
- Database monitored and optimized for ensuring fast and robustness.





Our Team

- 100+ employees across 10 countries
- Multi-cultural & multi-generational
- All people bring high expertise & passion
- High commitment with high standards of excellence
- Work in a culture of innovation, learning, and development



Work Culture



- 1-day working with student groups and regular for students to offer
- First group invited members for all performance opportunities (1st)
- This organization with student groups to provide 10-day physical training
- Students are getting better at physical performance





Link to Placements Dashboard

<https://shorturl.at/oNX01>

Drop us a line @

career@investwellonline.com



Thank you
Team Investwell

www.investwellonline.com