



## CRED FINANCE

CRED Finance is a new feature added to the popular CRED app, which allows users to invest in stocks and create customized portfolios. With personalized financial consulting and expert advice, the feature makes stock investment simple, hassle-free, and trustworthy. The focus of Phase 1 is on building the StockFolio feature, which allows users to create customized portfolios of stocks or invest in pre-made StockFolios by analysts and industry experts. The Watchlist feature will also allow users to track the performance of their portfolios before investing. The goal is to expand the feature set to include other investment options in the future.

CRED Finance is an important extension to the CRED app that provides users with a valuable service that was previously not available. With the rising popularity of stock investments in India, CRED Finance is poised to become an important tool for anyone looking to invest in stocks. The feature's focus on simplicity, convenience, and trustworthiness makes it a compelling offering that is likely to resonate with the app's existing user base. Moreover, the feature is built on the core principle of making stock investment simple and hassle-free for its users. The personalized financial consulting and expert advice features will give users the confidence and knowledge needed to make informed investment decisions.

CRED Finance is a significant step forward for CRED and will further enhance its reputation as a leading fintech company in India. The app already has a large & lucrative user base, and with the addition of CRED Finance, users will have access to a wider range of financial services, making it a one-stop-shop for their financial needs. Moreover, the product requirements for CRED Finance highlight the company's strategic alignment with its business goals, as well as its dedication to providing its users with an exceptional user experience. By focusing on building the Stock investment feature with StockFolio in Phase 1, CRED is taking a calculated approach to building a robust investment platform, allowing the company to test the market and gather user feedback before expanding the feature set in future phases.

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# Product requirements

**Product name: CRED Finance (CRED)**

## Vision

*Our vision for CRED Finance is to become the go-to financial platform for our users, offering personalized and expert financial advice, easy-to-use investment tools, and a seamless user experience. We want to empower our users to take control of their finances and achieve their financial goals.*

## Description

*CRED Finance is a feature within the CRED app that provides users with a range of financial services, including personalized financial consulting, expert financial advice, mutual funds, SIP and retirement planning, and stock investments. For Phase 1, our focus is on building a feature called StockFolio, which allows users to create customized portfolios of stocks or invest in pre-made StockFolios created by industry experts and analysts.*

## Timing

*We plan to launch the new customer experience within the next six months.*

## Status

**Not started**

**On track**

**At risk**

## Team

*Product Manager, UX/UI Designer, Front-end and Back-end Developers, Quality Assurance Engineer, Data Analyst.*

## Background

*Our research has shown that many of our users are interested in investing in the stock market, but find the process confusing and overwhelming. We also found that users are looking for personalized financial advice and expert guidance in making investment decisions. Our*

*competitors in this space include established brokerage firms and robo-advisors.*

## **Strategic alignment**

*Our goal is to make investing in the stock market accessible and easy for our users. By providing personalized financial consulting and expert advice, we aim to differentiate ourselves from our competitors and establish ourselves as a trusted financial platform. Our business case includes increasing user engagement and retention, generating additional revenue streams, and expanding our user base.*

## **Metrics**

- *User engagement with the StockFolio feature*
- *Number of users who create customized portfolios*
- *Number of users who invest in pre-made StockFolios*
- *Revenue generated from StockFolio feature*
- *User satisfaction with the StockFolio feature*

## **Who it benefits**

*The StockFolio feature will benefit anyone looking to invest in the stock market, from novice investors to experienced traders. We have identified two user personas:*

- *Novice Investor - A young professional who is new to investing in the stock market and is looking for guidance and support to make informed investment decisions.*
- *Experienced Trader - A seasoned investor who is looking for a more personalized and streamlined experience when managing their stock portfolio*

## **Use cases**

1. *A novice investor wants to invest in the stock market but doesn't know where to start. They access the StockFolio feature, select a pre-made StockFolio created by an industry expert, and invest in it.*
2. *An experienced trader wants to create a customized portfolio of stocks based on their investment strategy. They access the*

- StockFolio feature, select the option to create a custom portfolio, and choose the stocks they want to include.*
3. *A novice investor wants to invest in the stock market but is unsure about which stocks to choose. They access the StockFolio feature, select the option for personalized financial consulting, and connect with a financial expert who provides them with guidance and advice on which stocks to choose.*

### **Assumptions**

- *Our users will find the StockFolio feature valuable and easy to use.*
- *The pre-made StockFolios created by industry experts will perform well in the stock market.*
- *The personalized financial consulting will provide our users with the guidance and support they need to make informed investment decisions.*
- *The technical feasibility of implementing the StockFolio feature is achievable within the specified timeline.*

### **Investment required**

1. *Budget: \$500,000 for development and marketing*
2. *Headcount: 1 Product Manager, 1 UX/UI Designer, 2 Front-end Developers, 2 Back-end Developers, 1 Quality Assurance Engineer, 1 Data Analyst*

### **Product architecture and components**

*CRED Finance will be built as a feature within the existing CRED app. The architecture will consist of a server-side component that will handle the stock investment transactions and a client-side component that will provide the user interface. The server-side component will communicate with stock exchange APIs to retrieve real-time stock prices and other financial data, which will be used to calculate the user's portfolio value. The client-side component will be built using modern web technologies and will be optimized for performance and ease of use.*

## **Core features**

1. *StockFolio:* Users can create customized portfolios of stocks, or invest in premade stock portfolios by various analysts and industry experts. This feature will be the primary focus of phase 1 development.
2. *Premade StockFolios:* users can browse and invest in premade StockFolios curated by industry experts and analysts.
3. *Watchlist:* users can create a list of stocks and StockFolios they are interested in and monitor their performance over time.
4. *Stock market analysis:* Real-time stock market data and analysis will be provided to help users make informed investment decisions.
5. *Portfolio tracking:* Users can track their portfolio performance over time and receive notifications when significant changes occur.
6. *Secure transactions:* CRED Finance will use industry-standard encryption and security protocols to ensure secure transactions and protect user data.

## **User experience (UX) and user interface (UI)**

The UX and UI of CRED Finance will be designed to provide a seamless and intuitive experience for users. The user interface will feature a simple and easy-to-use design with intuitive navigation and clear call-to-actions. Users will be able to easily navigate to the StockFolio feature, where they can create customized portfolios or invest in premade portfolios. The user interface will also include real-time stock market data and analysis to help users make informed investment decisions.

## **Acceptance criteria**

- *The user interface is simple and easy to use, with clear call-to-actions.*
- *Users can create customized portfolios or invest in premade portfolios.*
- *Real-time stock market data and analysis are provided to help users make informed investment decisions.*
- *The security of user data and transactions is ensured through industry-standard encryption and security protocols.*

<b>Scope</b>	<p><i>For phase 1, the focus will be on building the StockFolio feature for stock investments. Other features such as personalized financial consulting, financial expert advice, mutual funds and SIP &amp; retirement planning will not be included in this phase.</i></p>
<b>Open questions</b>	<ul style="list-style-type: none"><li><i>• What specific APIs will be used to retrieve real-time stock market data and analysis?</i></li><li><i>• What types of premade portfolios will be offered and by whom?</i></li><li><i>• How will user data and transactions be securely stored and protected?</i></li></ul>
<b>Notes</b>	<p><i>CRED Finance is a key initiative for CRED to expand its product offerings and become a more comprehensive financial management platform for its users. The success of CRED Finance will be measured by user engagement, growth in the number of users investing in stocks through the platform, and the overall performance of users' stock portfolios. CRED will also be monitoring user feedback and iterating on the product to improve the user experience and add new features in future phases.</i></p>

## **EPICs for CRED Finance:**

### **EPIC 1: StockFolio - Create Customized Portfolios**

**Title:** Create Customized Portfolios with StockFolio Feature

**Description:** As a CRED user, I want to create a customized portfolio of stocks to suit my investment strategy so that I can make informed investment decisions and track the performance of my portfolio.

#### **Tasks:**

- Design the StockFolio feature in the CRED app that allows users to create custom portfolios of stocks.
- Develop the functionality to select and add individual stocks to the portfolio.
- Allow users to adjust the weightage of each stock in the portfolio to create a balanced portfolio.
- Enable the ability to view the performance of the portfolio in real-time.
- Integrate the feature with the Watchlist feature to track the performance of the individual stocks in the portfolio.

#### **Acceptance Criteria:**

- Users should be able to create a customized portfolio of stocks with a minimum of 10 stocks and a maximum of 30 stocks.
- Users should be able to adjust the weightage of each stock in the portfolio.
- The portfolio should be displayed with real-time performance metrics.
- The user should be able to track the performance of individual stocks in the portfolio using the Watchlist feature.

### **EPIC 2: StockFolio - Invest in Pre-made Portfolios:**

**Title:** Invest in Pre-made StockFolios by Industry Experts with StockFolio Feature

**Description:** As a CRED user, I want to invest in pre-made stock portfolios created by industry experts so that I can make informed investment decisions and benefit from the expertise of professionals.

#### **Tasks:**

- Design the StockFolio feature in the CRED app that allows users to invest in pre-made stock portfolios created by industry experts.
- Develop a rating system for the pre-made StockFolios that reflects the performance and reliability of the analysts and industry experts who created them.

- Integrate the feature with the Watchlist feature to track the performance of the pre-made StockFolios before investing.
- Enable the ability to invest in pre-made StockFolios with a single click.

**Acceptance Criteria:**

- Users should be able to browse and select pre-made StockFolios based on their rating, performance, and investment strategy.
- Users should be able to track the performance of the pre-made StockFolios in real-time using the Watchlist feature.
- Users should be able to invest in pre-made StockFolios with a single click.

**EPIC 3: Personalized Financial Consulting**

**Title:** Personalized Financial Consulting for Stock Investments

**Description:** As a CRED user, I want to receive personalized financial consulting for stock investments from experts so that I can make informed investment decisions and benefit from professional guidance.

**Tasks:**

- Design the Personalized Financial Consulting feature in the CRED app that allows users to consult with financial experts on stock investments.
- Develop a system for users to request consultations with financial experts.
- Integrate the feature with the user's portfolio and Watchlist to provide tailored advice based on their investment strategy and performance.

**Acceptance Criteria:**

- Users should be able to request a consultation with a financial expert through the CRED app.
- The consultation should be tailored to the user's investment strategy and portfolio.
- The user should receive actionable advice on how to improve their portfolio's performance.

**EPIC 4: Expert Financial Advice**

**Title:** Expert Financial Advice

**Description:** CRED Finance offers users access to expert financial advice to help them make informed investment decisions. Users can schedule one-on-one consultations with certified financial advisors who can provide personalized investment advice based on their financial goals and risk tolerance.

**Tasks:**

- Research and identify certified financial advisors to join the CRED Finance platform
- Develop a system for users to schedule consultations with advisors
- Implement a user-friendly interface for consultations
- Provide ongoing training and support to advisors
- Develop a system for tracking the success of consultations

**Acceptance Criteria:**

- Users can easily schedule consultations with certified financial advisors through the CRED Finance platform
- Advisors are knowledgeable and provide useful investment advice
- Users report high levels of satisfaction with the advice they receive
- Advisors receive positive feedback from users

## **EPIC 5: Mutual Funds**

**Title:** Mutual Funds

**Description:** CRED Finance offers users access to a range of mutual funds from top asset management companies. Users can invest in pre-made mutual fund portfolios or create their own portfolios based on their investment goals and risk tolerance.

**Tasks:**

- 
- Research and identify top asset management companies to partner with
- Develop a system for users to invest in pre-made mutual fund portfolios or create their own portfolios
- Implement a user-friendly interface for investing in mutual funds
- Develop a system for tracking the performance of mutual fund portfolios
- Provide ongoing support and training to users

**Acceptance Criteria:**

- Users can easily invest in pre-made mutual fund portfolios or create their own portfolios through the CRED Finance platform
- Users report high levels of satisfaction with the mutual fund investment options
- Users achieve positive returns on their investments

## **EPIC 6: SIP and Retirement Planning:**

**Title:** Retirement Planning

**Description:** CRED Finance offers users access to Systematic Investment Plans (SIPs) and retirement planning tools to help them achieve their long-term financial goals. Users can set up automated investments and track their progress towards their retirement goals.

**Tasks:**

- Research and identify top SIP providers and retirement planning tools to partner with
- Develop a system for users to set up automated investments and track their progress towards their retirement goals
- Implement a user-friendly interface for managing SIPs and retirement planning
- Develop a system for tracking the performance of SIPs and retirement plans
- Provide ongoing support and training to users
- 

**Acceptance Criteria:**

- Users can easily set up automated investments and track their progress towards their retirement goals through the CRED Finance platform
- Users report high levels of satisfaction with the SIP and retirement planning options
- Users achieve positive returns on their investments and reach their retirement goals on time

# USER STORIES

## Home Page

### 1. Title: Check Current Portfolio Status

**Description:** As a user, I want to be able to see the current status of my stock portfolio on the home page of the CRED Finance feature so that I can stay updated on my investments.

**Tasks:**

- The user should be able to view their current portfolio value.
- The user should be able to view their portfolio's performance over a specified time period.
- The user should be able to view their portfolio's allocation by asset class.

**Acceptance Criteria:**

- The user can see their current portfolio value displayed prominently on the home page.
- The user can choose to view their portfolio's performance over a specified time period, such as 1 day, 1 week, or 1 month.
- The user can view their portfolio's allocation by asset class in a clear and easy-to-understand format.

### 2. Title: Receive Notifications

**Description:** As a user, I want to receive notifications about significant changes to my portfolio so that I can stay informed and make informed investment decisions.

**Tasks:**

- The user should be able to choose what kind of notifications they want to receive, such as when a stock in their portfolio experiences a significant change in price.
- The user should be able to customize the frequency of notifications.
- The user should be able to easily access notifications from the home page.

**Acceptance Criteria:**

- The user can choose what kind of notifications they want to receive and customize the frequency of notifications from the settings menu.
- The user receives notifications in a timely manner when a stock in their portfolio experiences a significant change in price.
- The user can easily access notifications from the home page.

### 3. Title: Informational Video about StockFolio

**Description:** As a user, I want to be able to watch an informational video about StockFolio so that I can learn more about the feature and its benefits.

**Tasks:**

- The user should be able to access the video from the home page.
- The video should provide an overview of StockFolio and its benefits.
- The video should be clear and easy to understand.

**Acceptance Criteria:**

- The user can easily access the video from the home page, either by clicking a link or playing it directly on the page.
- The video provides a clear and concise overview of StockFolio and its benefits, highlighting its key features.
- The video is well-produced, with clear audio and visuals, and is easy to understand.

## Search Page

1. **Title:** Browse recommended StockFolios

**Description:** As a user, I want to browse recommended StockFolios so that I can easily find a StockFolio that fits my investment goals and risk appetite.

**Tasks:**

- Navigate to the search page
- View a list of recommended StockFolios based on my investment profile and preferences
- Apply filters such as "sort by," "volatility," and "performance" to refine the list of recommended StockFolios
- View key details about each recommended StockFolio, such as the return on investment, risk level, and investment strategy
- View the composition of each recommended StockFolio, including the individual stocks and their respective weightage in the portfolio
- Add a recommended StockFolio to my watchlist or portfolio

Acceptance Criteria:

- I can easily find the search page from the CRED Finance home page
- The recommended StockFolios are relevant and personalized based on my investment profile and preferences
- The filters work correctly and allow me to quickly find StockFolios that meet my criteria

- The key details about each recommended StockFolio are accurate and informative
- The composition of each recommended StockFolio is transparent and easily understandable
- I can easily add a recommended StockFolio to my watchlist or portfolio with just a few clicks

## 2. **Title:** Search for a specific StockFolio or stock

**Description:** As a user, I want to be able to search for a specific StockFolio or stock so that I can quickly find what I'm looking for.

### **Tasks:**

- Navigate to the search page
- Enter the name of the desired StockFolio or stock in the search bar
- View a list of search results that match my query
- Apply filters such as "sort by," "volatility," and "performance" to refine the list of search results
- View key details about each search result, such as the return on investment, risk level, and investment strategy
- View the composition of each StockFolio search result, including the individual stocks and their respective weightage in the portfolio
- Add a StockFolio search result to my watchlist or portfolio

### **Acceptance Criteria:**

- I can easily find the search page from the CRED Finance home page
- The search bar accurately captures my query and provides relevant search results
- The filters work correctly and allow me to quickly find StockFolios or stocks that meet my criteria
- The key details about each search result are accurate and informative
- The composition of each StockFolio search result is transparent and easily understandable
- I can easily add a StockFolio search result to my watchlist or portfolio with just a few clicks.

## **Create Page**

### 1. **Title:** Create StockFolio

**Description:** As a user, I want to create a personalized StockFolio with my selected stocks and investment amount.

**Tasks:**

1. Select stocks: The user selects the desired stocks to add to the StockFolio.
2. Name StockFolio: The user gives a name to the StockFolio.
3. Enter investment amount: The user enters the desired investment amount for the StockFolio.
4. Assign weight to stocks: The user assigns the weight or percentage of investment for each stock in the StockFolio.
5. Share StockFolio: The user has the option to share their created StockFolio with other CRED Finance users.
6. Invest in StockFolio: The user confirms the investment in the StockFolio and proceeds with the transaction.

**Acceptance Criteria:**

1. The user can select up to 20 stocks to add to their StockFolio.
  2. The user can assign weights to stocks with a minimum of 5% and a maximum of 50%.
  3. The StockFolio's total weight must add up to 100%.
  4. The user can enter an investment amount between 500 INR to 10,00,000 INR.
  5. The user can share their StockFolio via email or CRED Finance username.
  6. The user receives a confirmation message after investing in the StockFolio.
  7. The user can view the created StockFolio under their portfolio section.
2. **Title:** Manage StockFolios

**Description:** As a user, I want to manage the StockFolios I created by viewing their status, investing more in a stock, or changing the weights of each stock.

**Tasks:**

1. View StockFolio status: The user views the performance and current status of their StockFolio.
2. Invest more in a stock: The user selects a stock in their StockFolio to invest more money into.
3. Change weights of each stock: The user adjusts the weights or percentage of investment for each stock in the StockFolio.

**Acceptance Criteria:**

1. The user can view the current status and performance of their created StockFolio.
2. The user can invest additional funds into any stock in their StockFolio.
3. The user can change the weights of stocks in the StockFolio.
4. The total weight of the StockFolio must add up to 100% after changing the weights.
5. The user receives a confirmation message after investing more in a stock or changing the weight.

## Watchlist Page

1. Title: View Watchlist

Description: As a user of CRED Finance, I want to view my watchlist of stocks and StockFolios that I have saved but not yet invested in, so that I can monitor their performance and decide whether to invest in them.

### Tasks:

- Navigate to the Watchlist page in the CRED Finance app.
- View a list of all the stocks and StockFolios that have been saved to the watchlist.
- See the current price and performance of each stock or StockFolio on the watchlist.
- Sort the list of stocks and StockFolios by various criteria, such as price, volatility, or alphabetical order.
- Search for a specific stock or StockFolio within the watchlist.
- Click on a stock or StockFolio to view more detailed information about it, such as its price history and analyst ratings.
- Have the option to remove a stock or StockFolio from the watchlist.

### Acceptance Criteria:

- The Watchlist page is accessible from the CRED Finance app's main menu.
- All stocks and StockFolios saved to the watchlist are displayed on the page.
- The current price and performance of each stock or StockFolio on the watchlist are shown.
- The user can sort the list of stocks and StockFolios by various criteria.
- The user can search for a specific stock or StockFolio within the watchlist.
- Clicking on a stock or StockFolio shows more detailed information about it.
- The user can remove a stock or StockFolio from the watchlist.

# Investments Page

## 1. Title: Overview of investments

**Description:** As a user, I want to see an overview of my investments in one place, including the current value, total returns, and the returns percentage.

### Tasks:

- Display a summary of all my investments, including the current value, total returns, and returns percentage.
- Allow me to filter investments by time periods, such as today, this week, this month, this year, or all-time.
- Provide a clear and easy-to-understand interface with graphs and charts that show my investments' performance over time.

### Acceptance Criteria:

- The overview page should display accurate and up-to-date information about my investments.
- The filters should allow me to quickly see how my investments are performing over different time periods.
- The graphs and charts should be easy to read and understand, and should provide a clear picture of my investments' performance over time.

## 2. Title: StockFolio Insights

**Description:** As a user, I want to see the current value, total return, and return percentage of the StockFolios I have invested in.

### Tasks:

- Display the current value, total return, and returns percentage for each of my invested StockFolios.
- Allow me to filter StockFolios by time periods, such as today, this week, this month, this year, or all-time.
- Provide a clear and easy-to-understand interface with graphs and charts that show my StockFolios' performance over time.

### Acceptance Criteria:

- The StockFolio insights page should display accurate and up-to-date information about my invested StockFolios.

- The filters should allow me to quickly see how my StockFolios are performing over different time periods.
- The graphs and charts should be easy to read and understand, and should provide a clear picture of my StockFolios' performance over time.

### 3. **Title:** Stocks & Weights

**Description:** As a user, I want to see the insights, graphs, and portfolio weights of the StockFolios I have invested in.

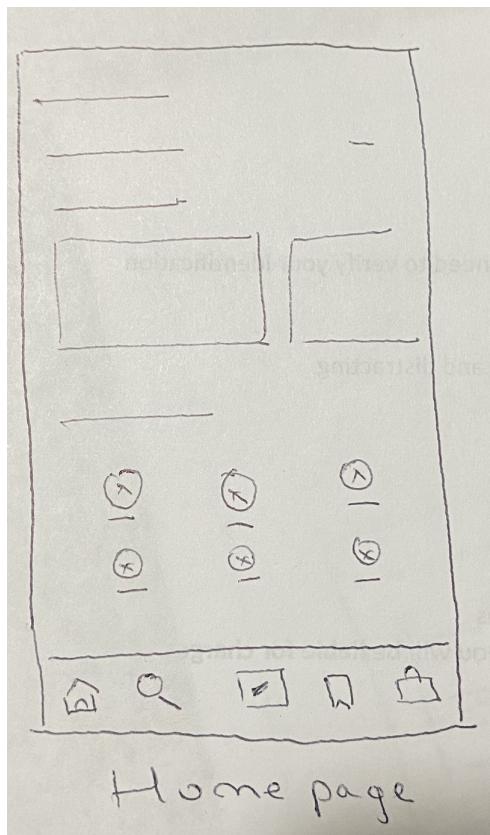
**Tasks:**

- Allow me to select a StockFolio from a drop-down menu.
- Display the current value, total return, and return percentage of the selected StockFolio.
- Show the portfolio weight of each stock in the selected StockFolio.
- Provide a clear and easy-to-understand interface with graphs and charts that show the performance of the selected StockFolio and its component stocks over time.

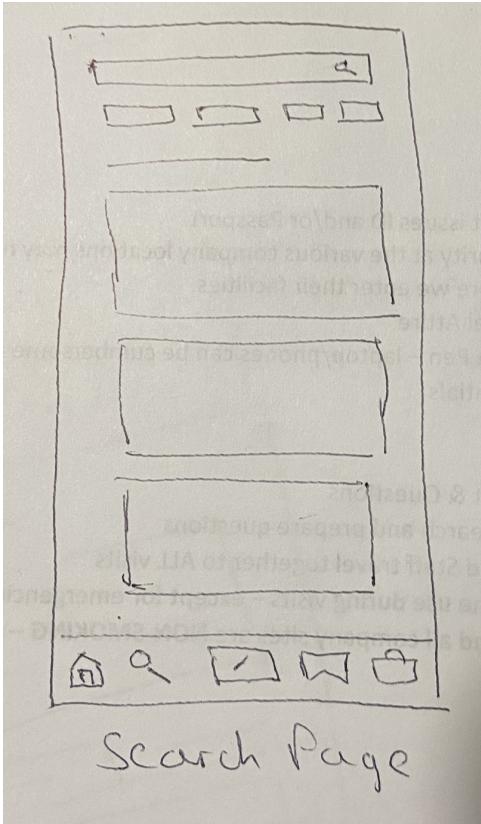
Acceptance Criteria:

- The Stocks & Weights page should accurately display the insights, graphs, and portfolio weights of the selected StockFolio.
- The portfolio weight should add up to 100% and should accurately represent the allocation of the StockFolio's assets.
- The graphs and charts should be easy to read and understand, and should provide a clear picture of the selected StockFolio's performance over time.

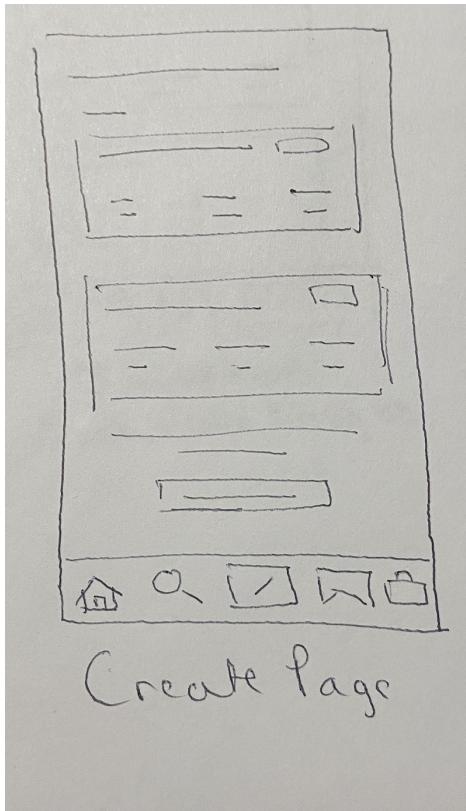
## WireFrames



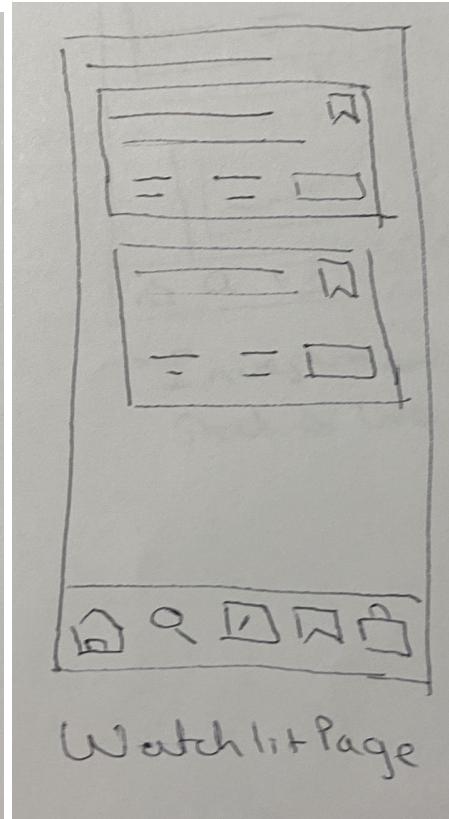
Home Page



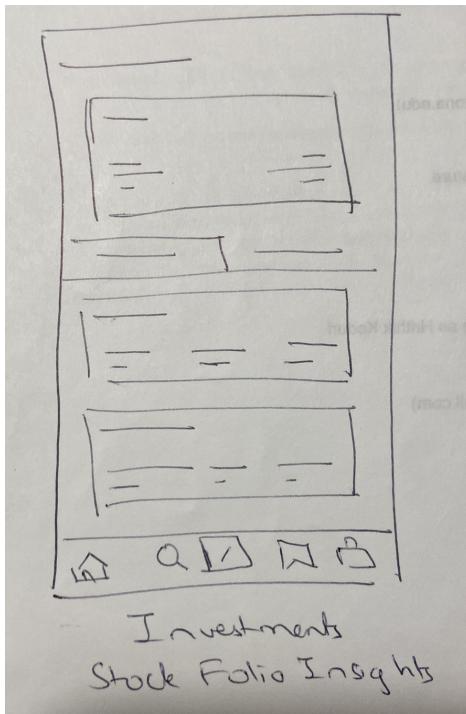
Search Page



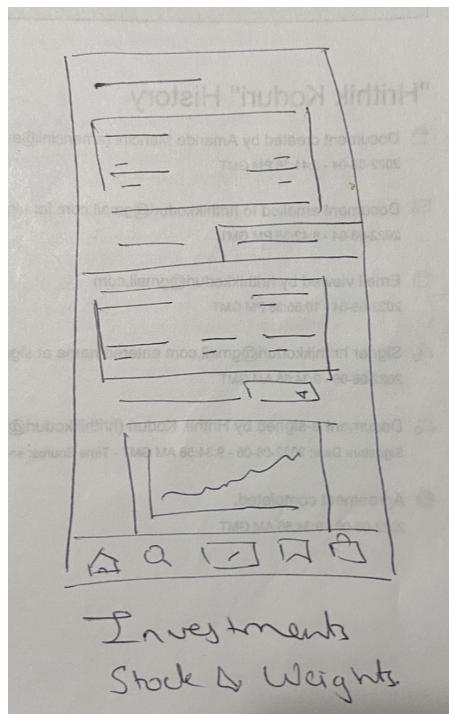
Create Page



Watchlist Page



Investments StockFolio Insights



Investments Stocks & Weights

## UI/UX Design - [Figma Link](#)

The image displays six screenshots of the CRED mobile application's user interface, showcasing its design and functionality across different screens.

- Home Screen:** Shows the main navigation bar at the top. Below it, sections for "MONEY" (CRED finance, bank accounts, credit score), "BENEFITS" (rewards, refer & earn, coins, balance, vouchers, brand offers), and "BILLS & PAYMENTS" (credit card bills, house rent, education fees, electricity bill).
- CRED HOME Screen:** Displays the current portfolio value of ₹ 15,65,000 with a 1.5% increase. It includes a "Notifications" section for "Wright Research" (Renew your subscription) and "Top 100" (Have a look at top 100). Below this are sections for "Take your top picks" (Popular collection of StockFolio), "Trending in 2023" (Popular under 5k, Retirement Planning), "Expert Advice" (Personalised Consulting, Mutual Fund/SIP), and a promotional message: "There is a StockFolio for Everyone! What is a StockFolio? Check out the video below to know more about it".
- Recommended for you Screen:** A search bar at the top. Below it, a "Recommended for you" section featuring three StockFolios: "All Weather Investing" (Low Volatility), "Top 100 Stocks" (Med Volatility), and "Green Energy" (High Volatility). Each card shows a brief description, 5Y CAGR, Min. Amount, and a volatility button.
- Stocks & StockFolios Screen:** A section titled "Your StockFolio" showing the "Nifty Index StockFolio" with 5Y CAGR of 9.4%, Amount Invested of ₹ 25,000, and Current ROI of 3.4%. Below this is a call-to-action: "Create more StockFolio and keep investing!" and a button to "Create your own Stockfolio".
- Watchlist Screen:** A section titled "Watchlist" showing three StockFolios: "All Weather Investing" (Low Volatility), "Green Energy" (High Volatility), and "House of Tata". Each card provides a brief description, 5Y CAGR, Min. Amount, and a volatility button.
- Investments Screen:** A section titled "Investments" with an "Overview" card showing Current Value of ₹ 15,65,000 and Total Returns of 11.78%. Below this are tabs for "StockFolio Insights" and "Stocks & Weights". Under "StockFolio Insights", cards are shown for "House of Tata" and "Top FMCG 100". Under "Stocks & Weights", a card is shown for "Green Energy".

**Investments**

**Overview**

Current Value ₹ 15,65,000 1.5%▲	Total Returns ₹ 1,65,000 11.78%▲
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**StockFolio Insights | Stocks & Weights**

**Performance vs Equity Large Cap**

Current value of ₹ 100 invested once at launch would be

House of Tata ₹ 156	Equity Large Cap ₹ 111
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As on Jan 23, 2023

**TATA by XYZ**

**House of Tata**

Companies part of the esteemed Tata group, a global enterprise with 150+ years of legacy

5Y CAGR: 25.3% Min.Amount: ₹ 12,665 **Low Volatility**

**Overview | Stocks & Weights**

**About the StockFolio:**

Tata Group is an internationally recognised Indian conglomerate. Founded in 1868 by Jamsetji Tata, the group operates interests in diverse sectors such as information technology, automobiles, steel, chemicals, power production, consumer products etc.

Read more..

**Performance vs Equity Large Cap**

Current value of ₹ 100 invested once at launch would be

House of Tata ₹ 156	Equity Large Cap ₹ 111
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As on Jan 23, 2023

**Invest Now**

**At a glance**

Stocks: 8	Rebalance Frequency: Quarterly
Last Rebalance: Mar 15, 2023	Next Rebalance: Jun 15, 2023

**Customize StockFolio**

**Stocks & Weights**

Stocks and Segments Weightage (%)

- Construction & Engineering: 11.28
- Volta Ltd: 11.28
- Precious Metals, Jewellery & Watches: 14.49

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## **UI/UX Interactions-**

