

Financial Advisory Platform

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A close-up, slightly blurred photograph of a laptop screen. The screen displays a financial dashboard. At the top, there is a line graph with a blue line showing an upward trend, with a label '19 av.' below it. Below the graph is a pie chart with a legend indicating 'New Visitor' (blue) and 'Returning Visitor' (green). The text 'Your trust, our financial expertise' is overlaid in white serif font across the center of the screen. The laptop's keyboard is visible at the bottom right.

Your trust, our financial expertise

Need

1. Financial illiteracy (More than 70% indians are not properly financially literate according to a 2015 survey)
2. Lack of discipline
3. Unproductive investment decisions
4. Need of goal oriented strategy
5. Study of risks and reward



The solution

Financial Literacy &

Advise (website & mobile App)

The Website

We can make financial education accessible to everyone through digital medium.

This will broadly have the following sections:

1. Educational content
2. Financial health analyser
3. Recommendation system
4. Tax Planner Experts help desk
- 5.

The Mobile App

1. Expense Tracker
2. Dashboard
3. There will be notification if the user exceeds their predefined limit of expenses.

An aerial photograph of the New York City skyline at dusk. The sky is a mix of dark purple, blue, and orange. The city is densely packed with skyscrapers, many of which are illuminated with lights. The Empire State Building is prominent in the center, with its top lit in red and green. The Hudson River is visible on the right side of the image. The title "Cost Benefit Analysis" is overlaid in white text on the left side of the image.

Cost Benefit Analysis

Cost Analysis

**Website
Development
Cost**

+

**Maintenance
Cost**

Benefit Analysis



+



+



An aerial photograph of the New York City skyline at dusk. The sky is a mix of dark purple, blue, and orange. The city is densely packed with skyscrapers, many of which are illuminated with their interior lights. The Empire State Building is prominent in the center, with its top lit in red and green. The Hudson River is visible on the right side of the image. The title 'Competitive Analysis' is overlaid in a white, serif font in the center-left area.

Competitive Analysis

Different Sources Of Financial Advice

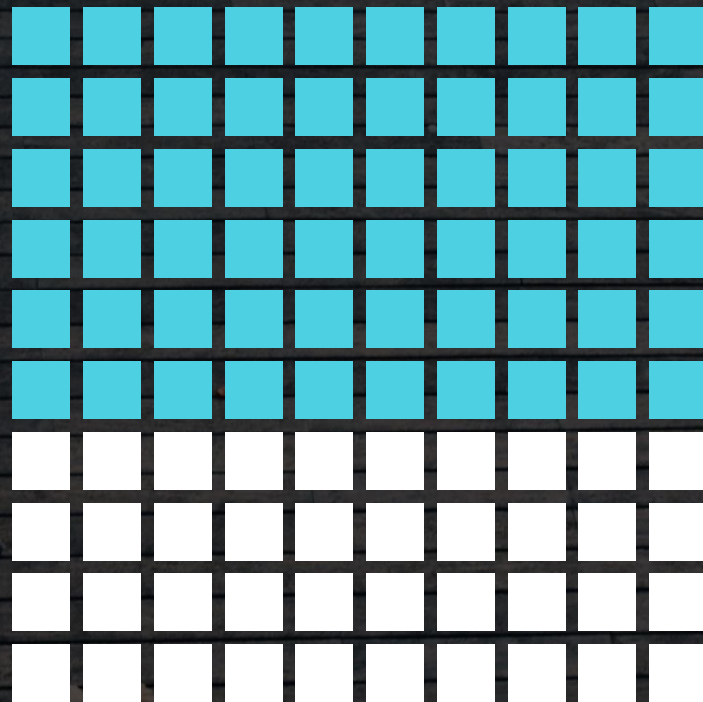
- 01 Mutual fund distributors
- 02 Insurance agents
- 03 Bank relationship managers
- 04 Stock brokers
- 05 Wealth managers
- 06 Robo & Fee-only advisors

Peer Comparison?

Investing.com

Acorns

MyMoneySage



Quick Comparison

peers	Education	Advice	Personal Finance Assistance	Tax Planner
investing.com	•	•		
myMoneySage		•		
Acorn	•			
Our Product	•	•	•	•

How our idea works?



What users can achieve?

1. How to budget ?
2. Management of debt
3. Investments
4. Risk Management (hedging)
5. Discover opportunities
6. Financial freedom!

Overall Impacts

1. Independence & Security
2. Improved financial literacy
3. Peace of mind
4. Economic recovery of our country!

