

# संपत्ति-पूंजी

Asset Management

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# Persona: What is this website (first time visitor)

- Who are we?
  - “Punch line”
- What do we provide
  - Investment Products / and Advising



# Persona: I know nothing about investments

## (New to Investments)

- Knows nothing about investing
- Describe different kinds of assets
  - Use Videos
- Talk about MF, What are MF
- How is MF investing different from Traditional
  - (Property: Need large amount or loan, no insight on the growth of asset)
  - (Savings / Fixed Deposits: How the money is locked),
- Show / Describe the power of compounding (Use rich Graphs)
- Describe SIP (Systematic Investment Plan) – Goal Specific Investing
  - Retirement
  - Child Education, (others)
- Show all risks



# Persona: what is MF (research)

- What is a Stock / Equity
- What are bonds / debts
- What is a MF
- What is ETF
- What is Insurance
  - Types of Insurance
    - Life
    - Residential Property, Commercial property, personal Auto, Fleet (transport / Taxi aggregators)
  - How different from Stocks

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# Persona: Why invest with us?

(Ready to invest, Comparing with other online platforms)

- We put Investors above anything else, and focus on whats good for investor, not good for us
- We charge no commission,
- Based on Investment strategy, we charge nominal fees
- Provide powerful tools and insights (Use graphs)
- Planning and advice giving knowledge on managing budget, managing loans and savings.
- Advantage in dealing with us: One-stop shop for all MF across India, and any new MF
- Backed by licensed MF distributor with required certifications (SEBI / NSE)
- Describe all affiliations
- Describe Investing advisor certifications
- We work independently and use our expertise in areas of Finance / Derivatives



# Persona: I am ready to invest, but is Online investing safe?

- Backed by trusted certificates
- Highest level of encryption (what is encryption)
- Tools to avoid scams , phishing (what is phishing), authentication (e.g. first time login from a new browser)
- Online tools help visualize own goal tracking, view transactions online with on-line statements etc



# Persona: how should I start

(Help me)

- Goal Seeker (What's in your mind): Retirement, Child Education, Specific Target for next 5 years, 10 years, or 15 years (e.g. start your own business)
- Ask for Risk appetite : (new / conservative, moderate, comfortable)
- Suggest Mix of MF (Equity / Bonds / Cash) in respective ratio
- Use our Target (what do we do?)
- Manage on your own
- Show available MF
  - Show all aspects of MF: Holding, Performance, NAV (52 week range) etc



# Persona: I am ready

- Create Account with us / Sign in
- eKYC
- Verification
- Net Banking Details
- Build your assets (link to Goal Seeker)





# Persona: Who are the people behind this

- Contact us
  - Email / phone
- Active Facebook / Twitter pages with FAQ
  - FB page helps in sharing info



# Persona: I want to track my investment

- Show existing investments (show allocation – pie chart)
- Show performance growth from inception time (percentage)
- Option to open new Portfolio for another goal (2<sup>nd</sup> child education)



# Persona: I want to be alerted based on my preference

- Set up email alerts for:
  - New transaction
  - Monthly Online Statement
  - SMS Alert on Price
  - Change in investing amount
  - Change in allocation



# Thank you



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