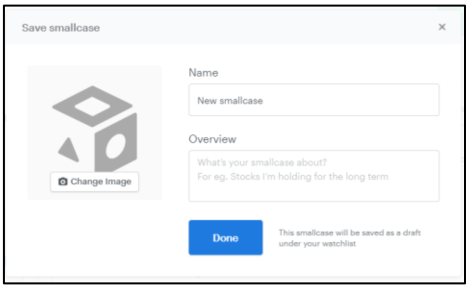
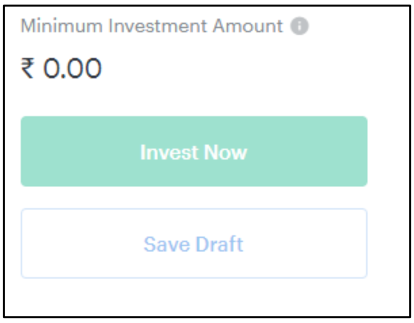
<u>Bugs for the SmallCase</u>

- ## <u>Create SmallCase</u>

1. When creating a new small case, if there is no name and description then the **<u>Done</u>** button should remain disabled.

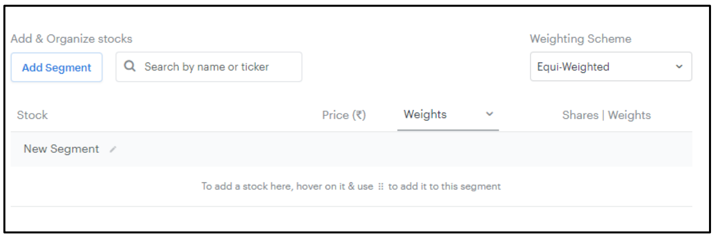


Should be displayed like this.

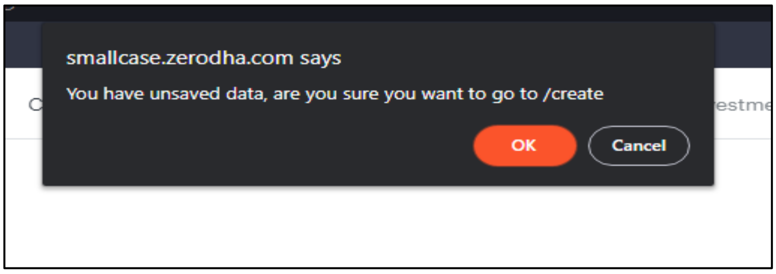


2. No option provided to create a new smallcase, after one is saved as a draft.

3. Without any stock listed, one can add a new segment.

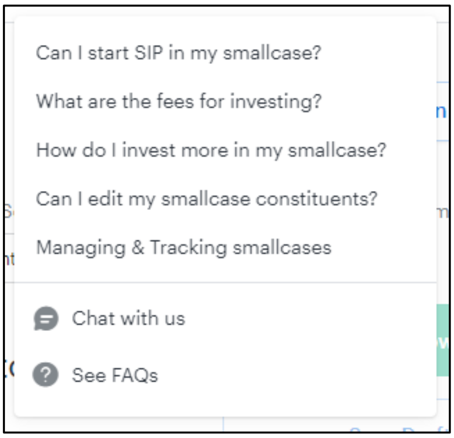


4. No option provided to cancel the draft created for the small case, if the user wants to discard the one. As it can only be discarded till user navigates to the other page.



5. Just like info icon is provided for **Minimum Investment Amount**, one should be provided for the **Weightage Scheme** giving a brief description what it means.

6. No link to a blog to understand, how to create a new smallcase under the **FAQ** icon.



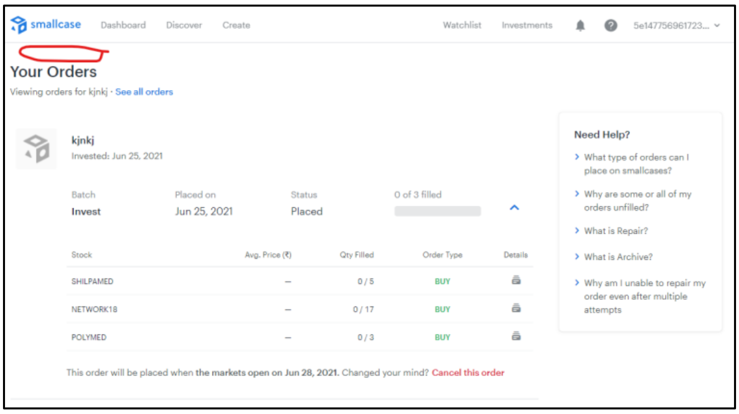
7. Character limit on the name and description for the small case, when created, should be greater than one.

8. When creating a new segment, if a stock is added then a modal window should be displayed for setting the name of the segment, rather than editing after the stock is added in the segment.

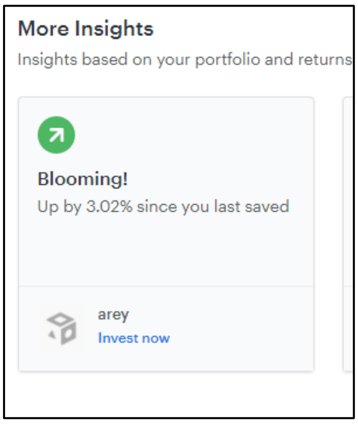
9. Unable to add any new stocks in to the old segment(s), if two or more segments. The focus is always on the latest segment.

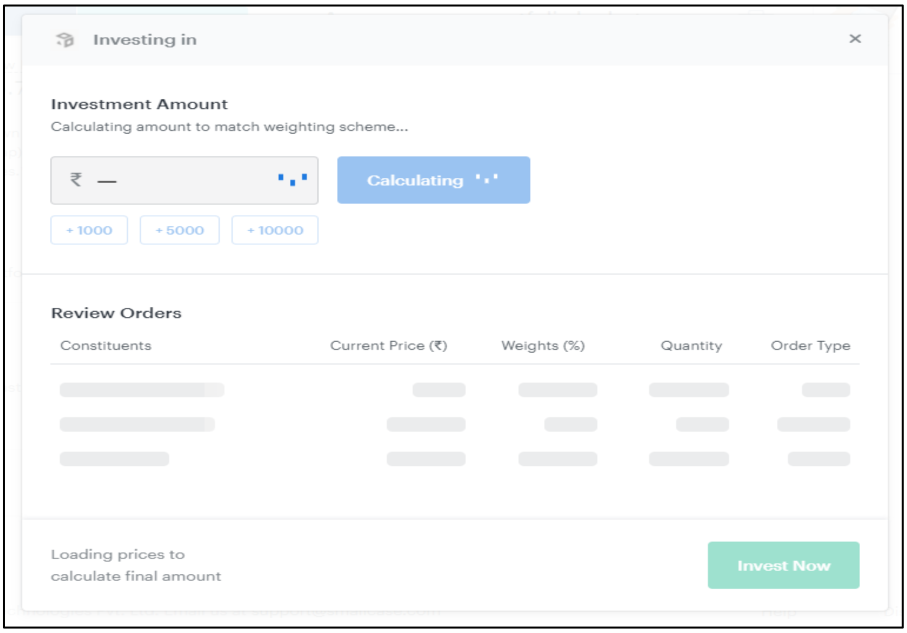
- **<u>Investments</u>**

  1. When a small case order is selected from the list of investments, there is no option to navigate back to the Investments page, until the Investment option is clicked from the header.

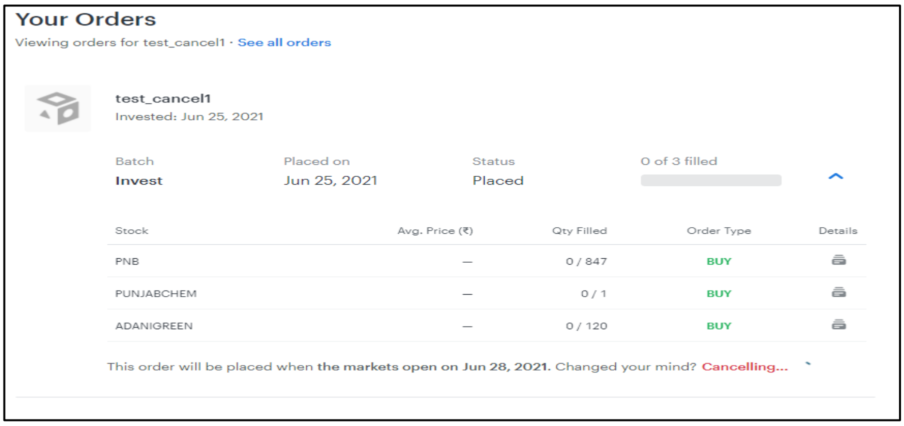


  2. Unable to load the small case suggested in the **Blooming** section of the **Insights**.



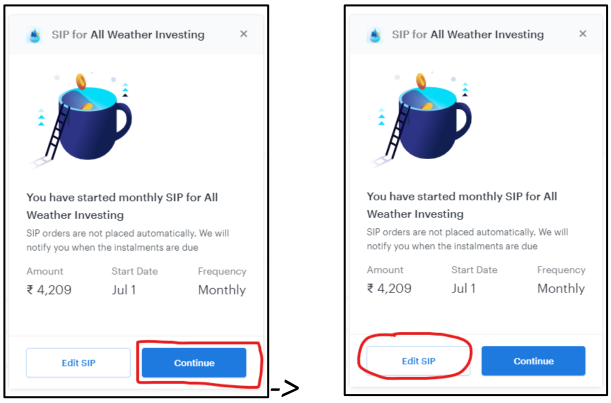


3. The cancellation of order is stuck in limbo, once the confirmation is given.

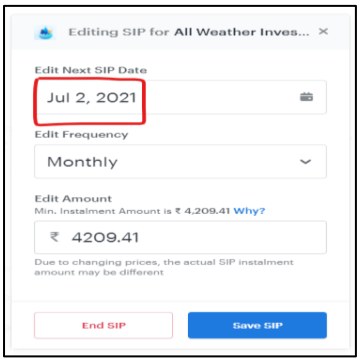


4. The message informing the user of the amount, start date and frequency isn't displayed, if the user decides to edit SIP before clicking on continue.

Before clicking on **Continue**, *click on* **Edit SIP**.

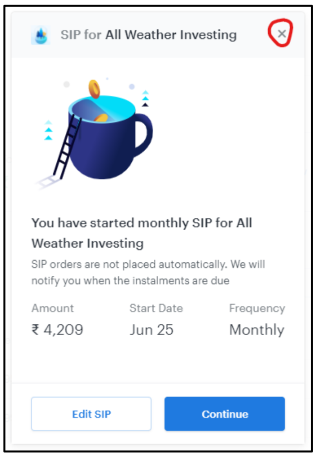


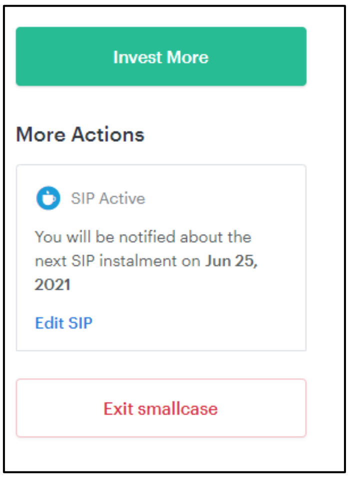
A modal window displays for the edit section, say change the date.



Click on Save SIP, and the confirmation window displayed in Step1 *isn't visible and prompted to confirm the changes.*

5. If the **close icon** (x) is clicked on the Start SIP confirmation window, the SIP is created. In fairness it shouldn't be created if the modal window is closed.



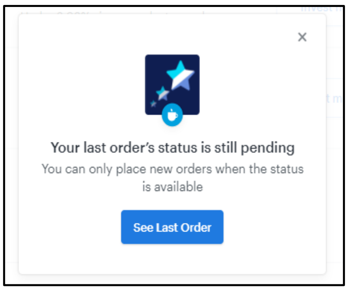


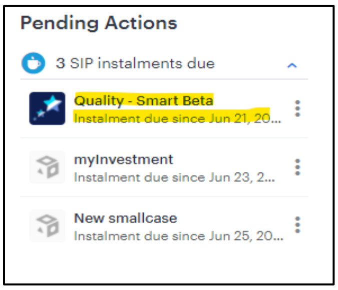
6. A filter option should be provided on **Investments** page, as to filter out the small cases based on different criteria such as order pending or placed, SIP Active or Inactive etc.

7. A sort option should be provided on the Investments page, as to sort the small cases invested in, based on name, volatility, order of the small case order placed etc.

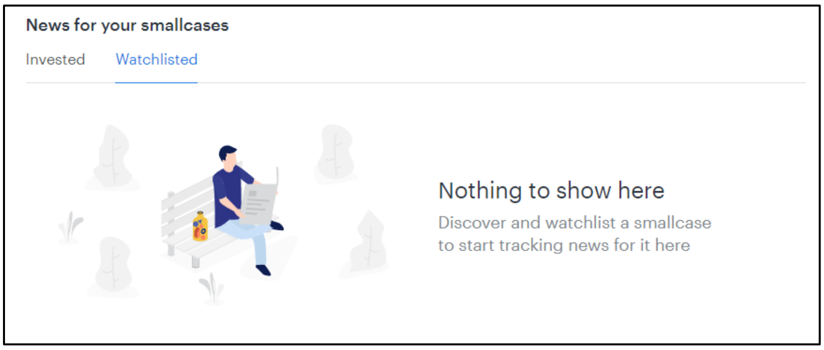
- ## <u>Dashboard</u>

1. If the last order status of a small case is still pending, then instalment is due for the small case shouldn't be displayed.

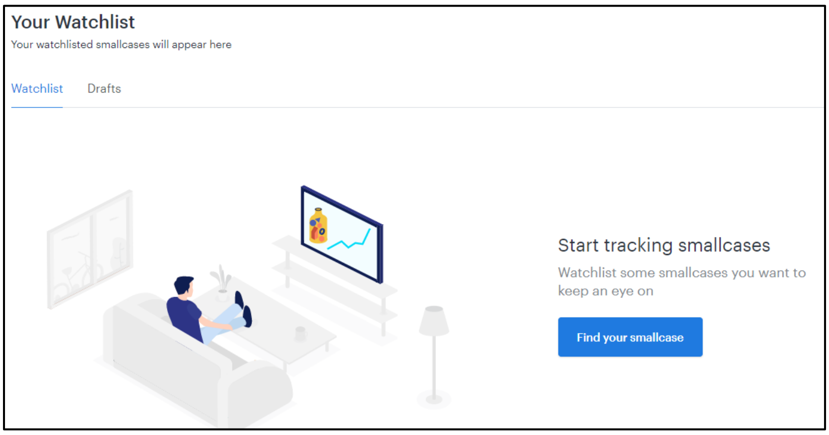




2. An option should be available in the Watchlisted tab of the News section, to discover the small cases if one wants to explore any new small cases.

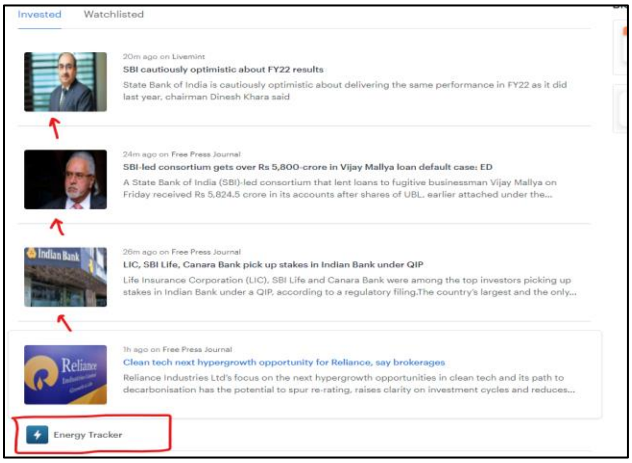


Rather it should display something like this.



3. No option for helpful links displayed.

4. Not every news snippet has indication of which smallcase it corresponds to.

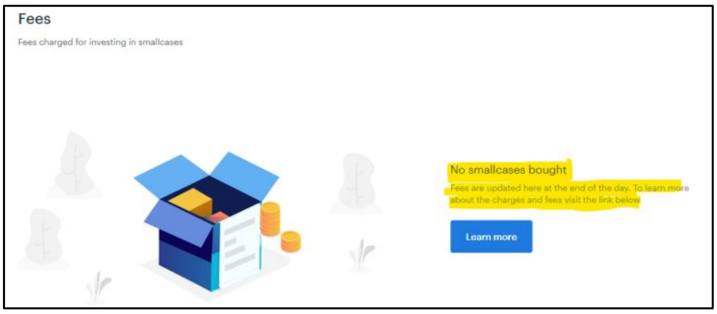


5. No notification was received after the order was placed; even after enabling the **Stay updated on WhatsApp** toggle.

- ## <u>Profile</u>

1. When the contact info, **Phone**, is updated in the profile, no confirmation of any sort <u>such as OTP</u> is prompted for, at least confirming that the correct number is being updated.

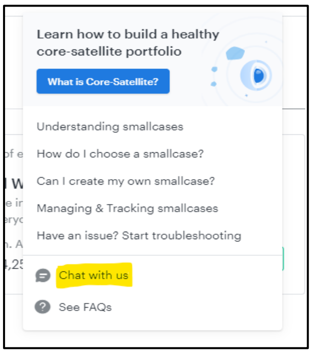
2. No fess is displayed for any of the Small cases created or customised, where it should have been displayed. Considering several order have been placed in the past.



3. A filter option must be provided on the **Orders** page, as to trickle different stocks based on various parameters such as **Batch** type, date of order **Placed on**, **Status** such as *filled* or *placed*; and multiple filters can be selected at once, etc.

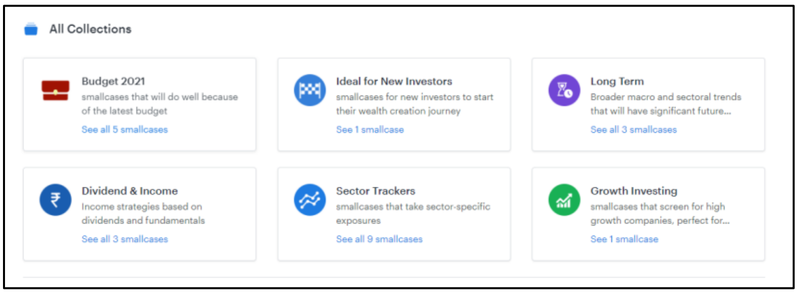
4. Sorting option is not available, as to sort the order placed, as to view in a particular order such as **Name of the SmallCase**, the **Amount**, recently **Placed** or not, etc.

5. The chat box doesn't open up when the option **Chat with us** is clicked on

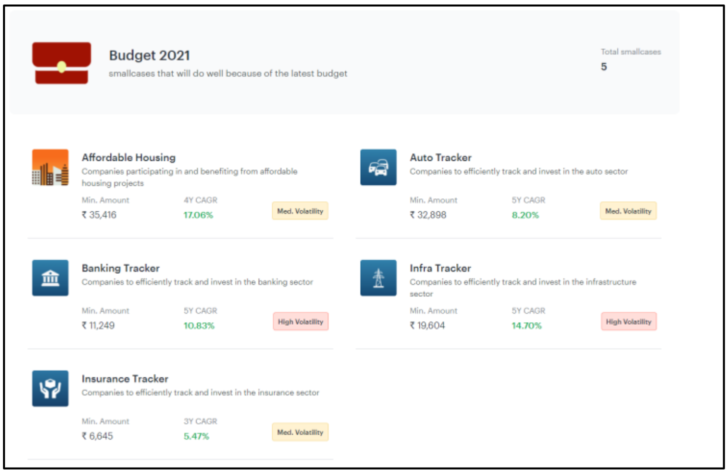


6. Unable to open the details of the order when clicking on an individual order from the **Your Orders** list.

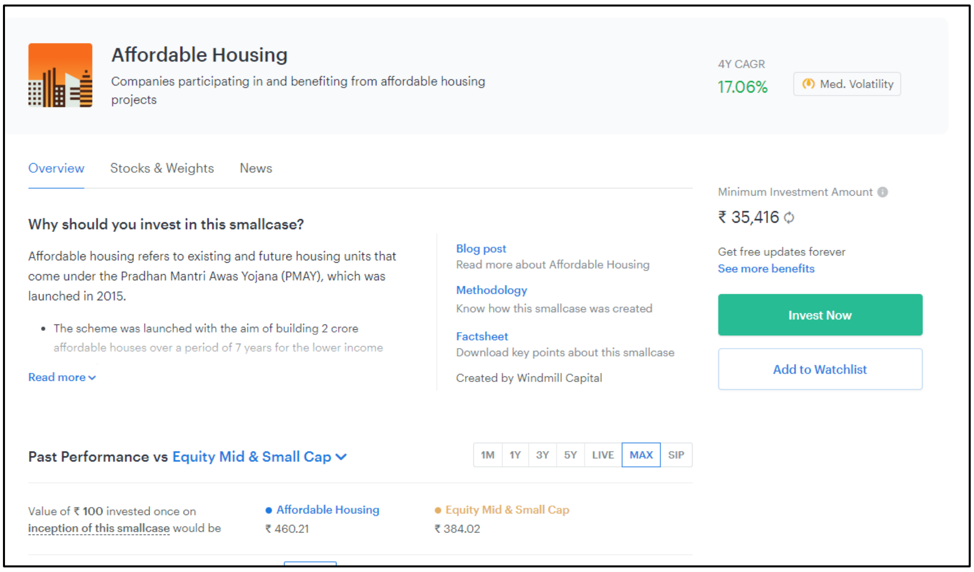
- <u>**Discover**</u>
  1. No option is provided to navigate back to the previous screen when discovering through various smallcases collections.



Now select any of the collection. Let's say Budget 2021.



Select any one of the SmallCase.



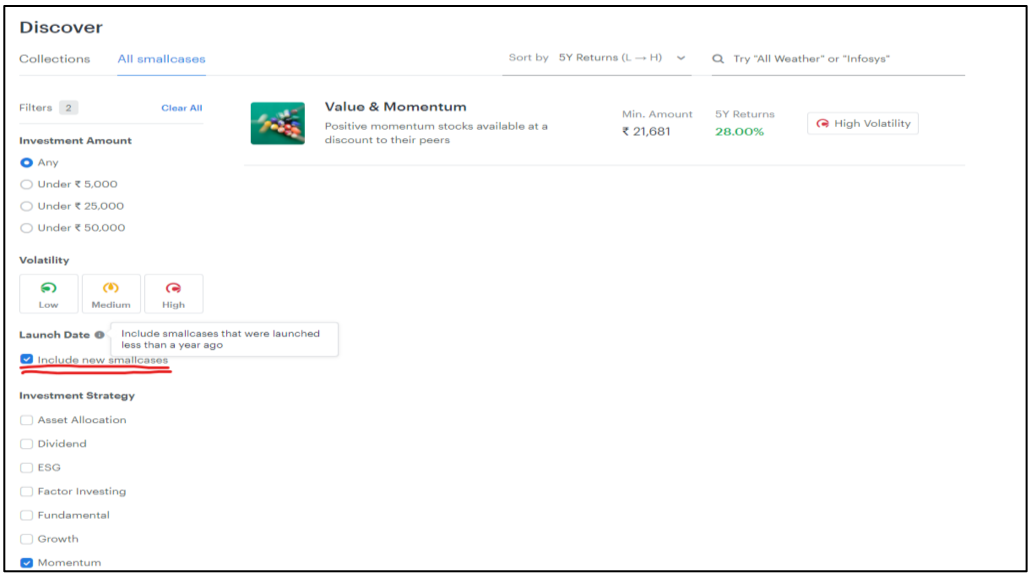
In any one the screen no option is provided to navigate back to the previous screen to <u>change the selection</u>.

- ## <u>All SmallCases</u>

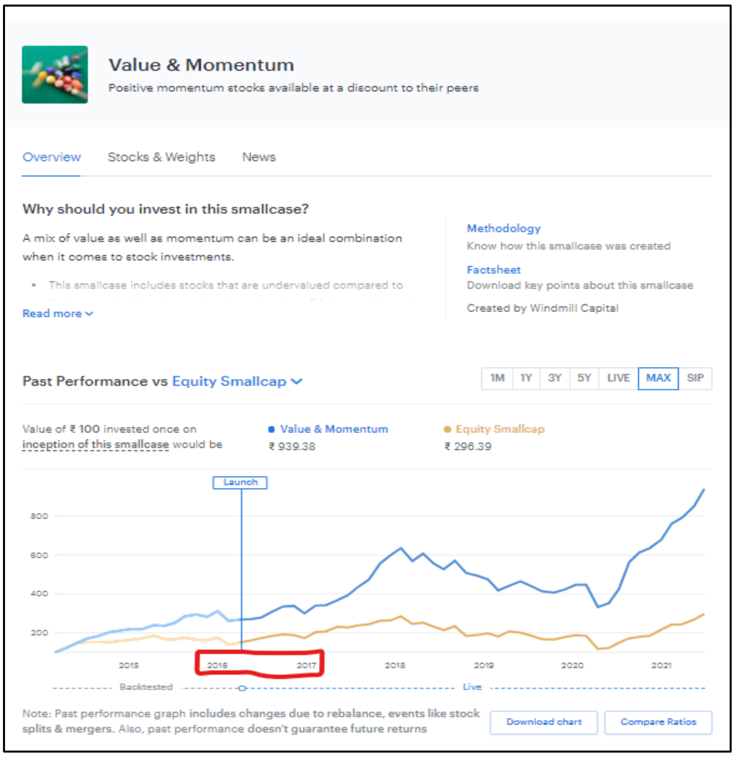
  1. No filters for free access or subscribed.

  2. The filters are working properly, when the filter included small cases less than one year old, even then it displayed a small case conceived more than one year ago.

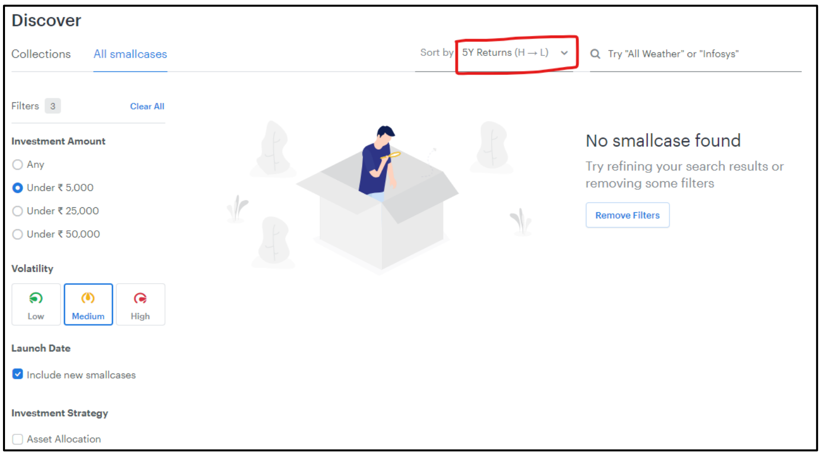
  *The filter screen, where <u>Include new smallcases</u> is **enabled**.*

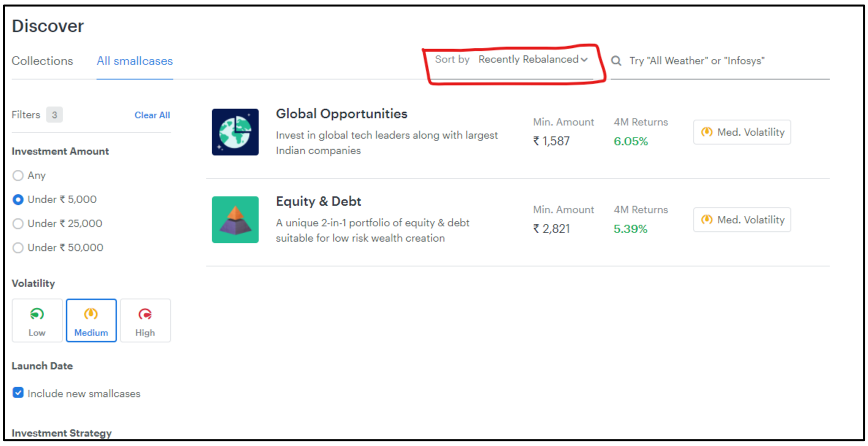


As you can see that the launch date of the smallcase is between 2016-2017.



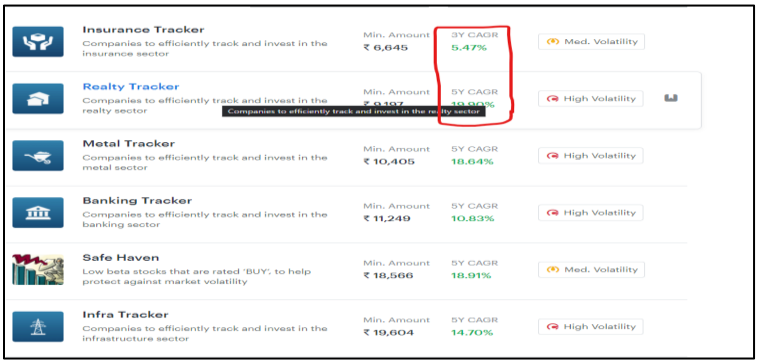
3. The sorting feature works as filter. When selected the **Returns** for **5Y**, no smallcase was displayed, when changed to **1M** then some test cases were displayed.
   And when those sorting option was changed to any other choice such as **Popularity**, **Recently Balanced**, or **Minimum Amount**, and then the smallcases was displayed.
   Even if the smallcase is one month old, for the sorting of time period, calculate the return for relative time period.



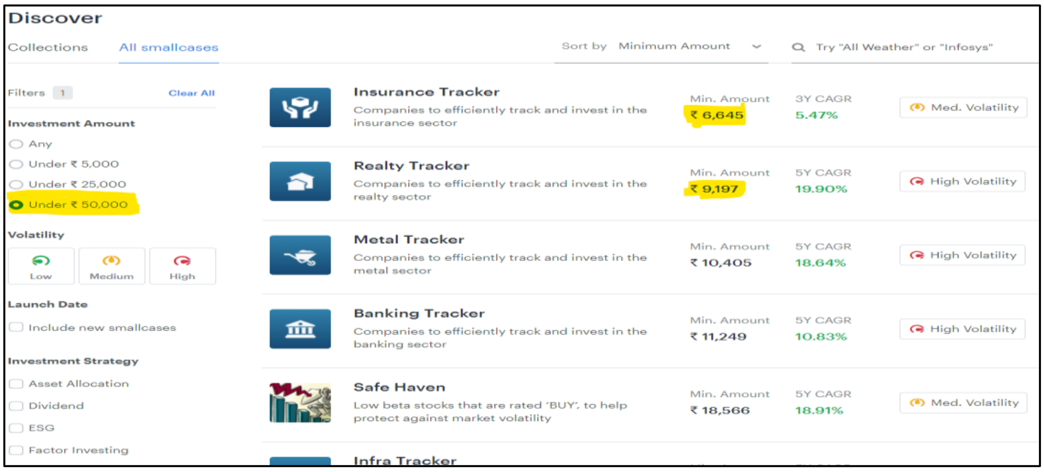


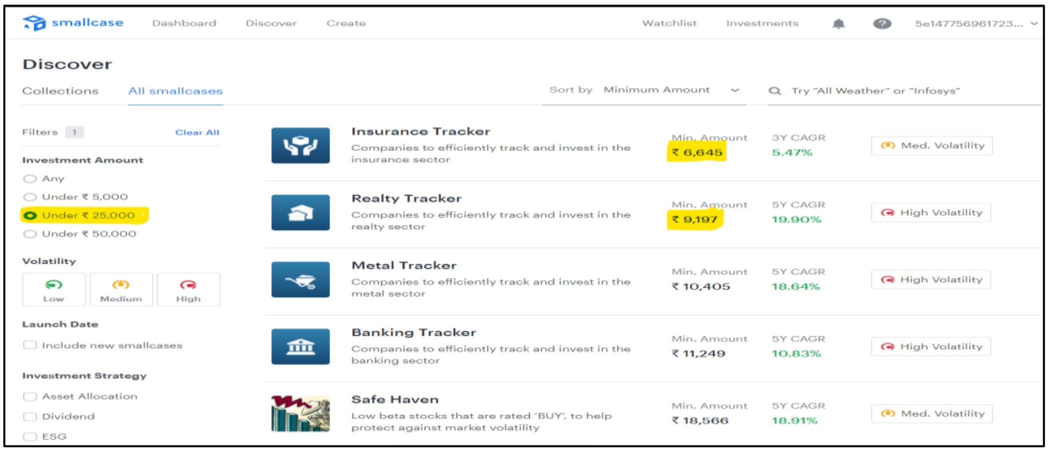
4. No filter to sieve out the smallcases on the basis of the **Created By**, that is, the manager of the smallcases.

5. Have a consistency of the minimum CAGR for all the smallcases to display through.



6. The filter for the **Investment Amount** is not clear. **Under ₹ 50,000** specified that any amount between INR 1 – INR 50,000; rather the minimum investment amount being always being INR 1.

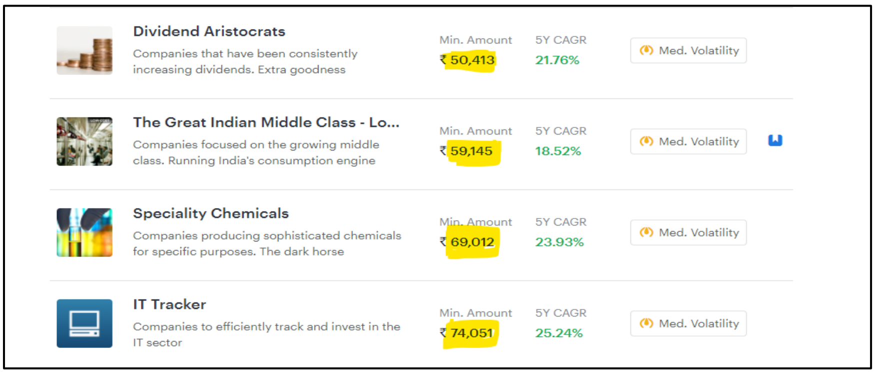




7. Wouldn't the **Launch Date** checkbox make more logical to be to exclude the new smallcases and list all the smallcases as default.

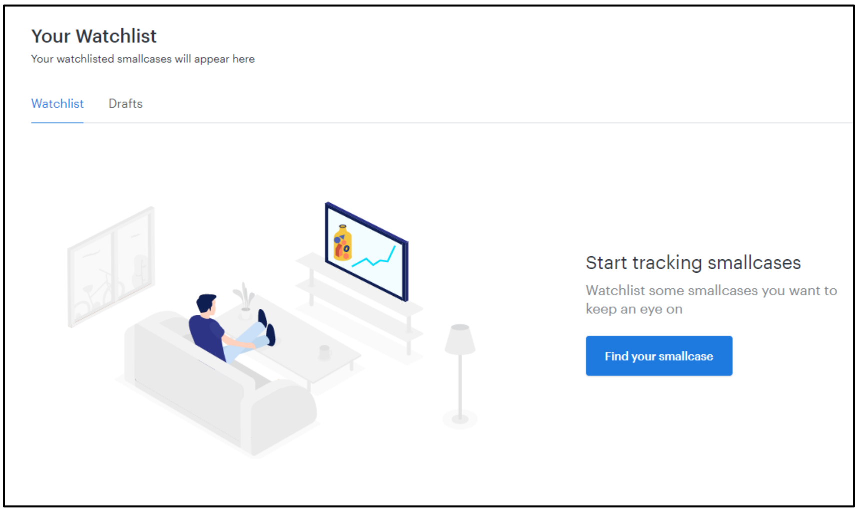
8. No filter to trickle down the smallcases based on the age, meaning how many years have the smallcase been active.

9. **Under INR 50,000** is the highest range of the Investment amount filter, whereas there are smallcases higher than that.

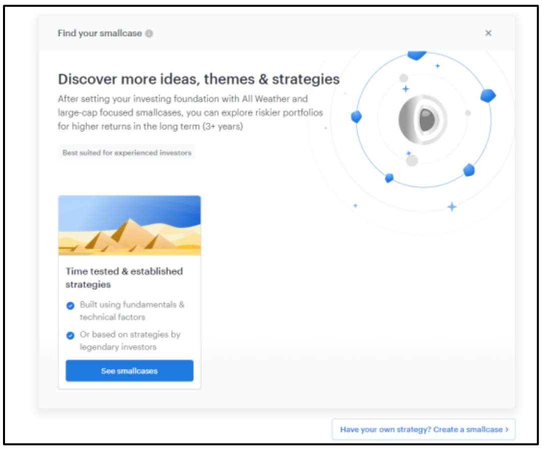


- ## Watchlist

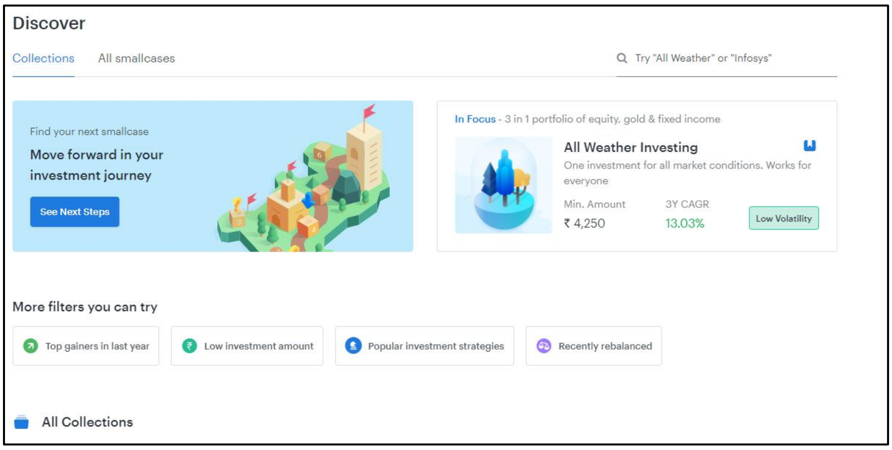
  1. When one clicks on the option to **Find your smallcase**, then one is navigated directly to the modal window of the **See next steps**, rather logically it should display the **Discover** > **Collections** page.



Click on the option **Find your smallcase**. *This window is displayed*.

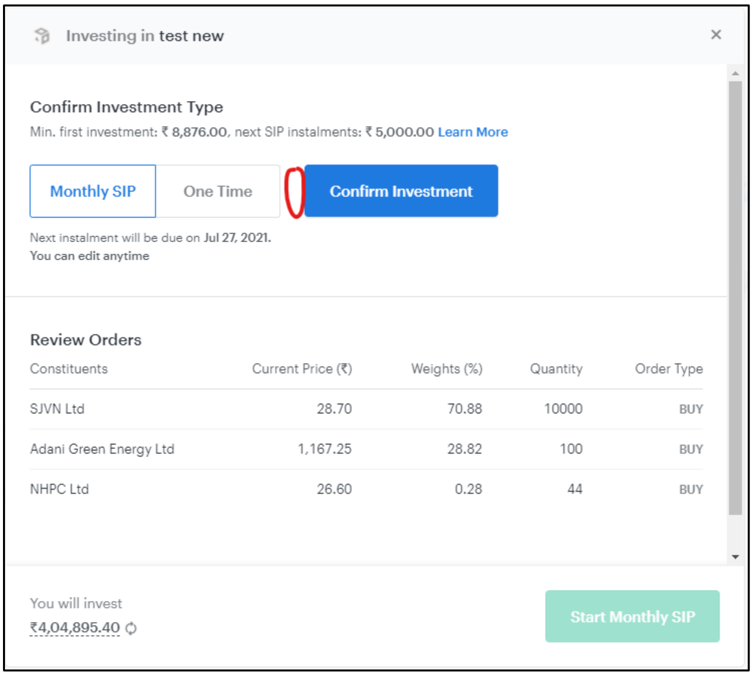


Rather the window that should be displayed is for **Discover** > **Collections**.



- **<u>Drafts</u>**

   1. Even though the minimum investment amount is exuberant, the text box to increase the amount must be displayed.



   2. No sort option provided on the drafts page, to view them in a particular order.

   3. No filter option to tickle down any drafts on certain conditions, if required.

   4. No <u>cancel option provided to undo any changes</u> if the draft is opened through **Customise** option.
   The only way to discard the changes, is to navigate to the other page, and then an alert is displayed that the changes done will be lost.