



# INTELLIGENT INVESTOR ONBOARDING PORTAL

Google

4.0 ★★★★★☆

Clutch

4.9 ★★★★★★

glassdoor

4.5 ★★★★★★

Countries we operate from





# PROBLEM STATEMENT



**SBI Mutual Fund**, one of India's largest fund houses, was struggling with sluggish investor onboarding and limited personalization—resulting in poor CX and high operational costs.

Inefficient communication between investors and RM teams.

Absence of personalized investment recommendations.

Lack of real-time tracking for stakeholder performance.

Cumbersome manual onboarding for new investors.





# INT.'S SOLUTION



INT. implemented an **AI-powered investor experience portal** with:

- ✓ **Automated onboarding workflows** and **KYC checks**.
- ✓ **Dynamic dashboards** offering personalized fund suggestions.
- ✓ **Real-time market data integration** for recommendations.
- ✓ **Self-service features** to reduce support dependency.



# Process Followed

01

## Investor Profiling

Mapped key personas and  
behavioral flows

02

## Personalized UX Design

Crafted interfaces tailored to investor  
journeys

03

## System Integration

Connected CRM, fund performance  
APIs, and onboarding tools

04

## Optimization Loop

Continuously improved features using  
real-time usage analytics



**62%**

quicker onboarding via automated KYC and digital investor paths.

**17%**

cutting operational costs came from removing manual tasks and optimizing support.

**2.1x**

increase in investor retention was driven by personalized experiences and smart fund suggestions.

**30%**

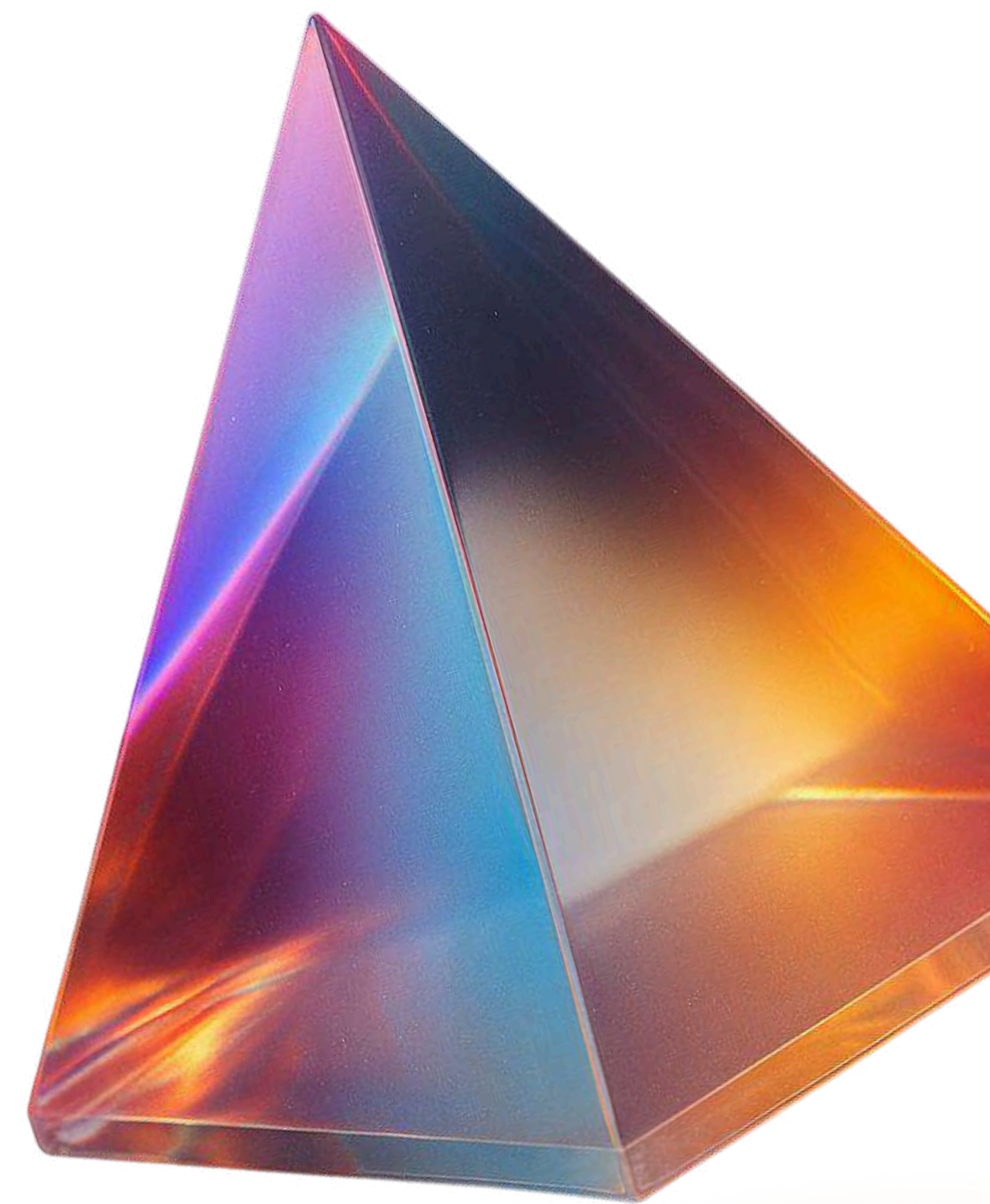
boost in RM productivity came from real-time dashboards and investor behavior insights.

**40%**

drop in support tickets followed the launch of intuitive self-service features.

**22%**

rise in fund conversion rates was enabled by AI-powered, context-aware investment recommendations.







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**1000+** Professionals

**45+** Countries

**30+** Awards

INT. (Indus Net Technologies) is an award-winning full-stack software engineering solutions company with a pioneering legacy spanning 26 years, over 500 clients, and 11,000 plus client projects. INT. operates at the confluence of Data, technology, and marketing in the digital space.

