

INT.

**SBI Mutual
Fund**
#DigitalSuccess Stories

Scalable and Smarter Web portal deployed to manage portfolios without much hassle.



SBI mutual fund is privately held mutual fund services was looking to revamp its web portal and come up with a smarter portal which will have intuitive UI to manage portfolios easily.. Also, the web portal will be scalable and minimise the click to service journey based of the UX.

SBI teamed up with INT. and develop a scalable web portal which will be catered to all devices with multiple integrated functionalities.

About The Client

Industry

Mutual Fund

Headquarters

Mumbai

Website

<https://www.sbimf.com/en-us>

With 30 years of rich experience in fund management, SBI Funds Management Pvt. Ltd. (SBIFMPL) bring forward their expertise by consistently delivering value to the investors. They have a strong and proud lineage that traces back to the State Bank of India (SBI) - India's largest bank.

Their mission is to establish Mutual Funds as a viable investment option to the masses in the country. Today, they are actively managing investor's assets not only through their investment expertise in domestic mutual funds, but also offshore funds and portfolio management advisory services for institutional investors.

The Problem Statement

India's largest Bank wanted to revamp its existing mutual fund website which will be a smarter interface to manage portfolios seamlessly. Initially, the users had to go through multiple clicks for achieving a particular objective. Slowly, this became tedious for users to view, manage and switch portfolios. Thus they were looking for intuitive UI which will minimise the UX based journey which tries to minimise the simple click to interface on their web portal.

The second challenge that they faced was they were unable to integrate other existing services and were also lacking application of the business

SBIMF's legacy system failed to scale and cater to multiple devices at once from multiple geographies. SBIMF collaborated with INT. to build a scalable portal to resolve the third challenge.

Business Solution

Technology Stack

Frontend: Angular,C Sharp and Sitefinity

Backend: Dot net Core

Database: SQL Server and Oracle

Android: Kotlin

ios: Swift 5.3

Cloud: Docker

Legacy portal was replaced by an intuitive, contemporary and advanced web portal which was supported by new UI/UX that helped them in easy navigation user interface, optimised standard workflows and delivered a elevated customer experience with advanced functionalities.

Secondly, we created application to modernize the legacy system which will also help in integrating the services with other sister companies. INT provided an intuitive web solution that increased efficiency in workflow. It helped adding multiple accounts quicker. the idea was to develop scalable functionalities in the revamped web portal.

To enhance the portal's functionality, INT added few unique features that will be compatible for both android and iOS

1. **Account addition** - To help users in adding multiple account addition
2. **Startup kit**-
3. **Recommendation engine**:
4. **New scan code**
5. **Portfolio**: Graphical view of portfolio to view all schemes, investment and return of the portfolio. It also enables users to view multiple accounts from the user's account.
6. **Track Transaction**: Able to view details of transactions. It will enable user to view their upcoming and past transactions too.
7. **Switch**: On clicking Switch option the from the Folio view on the Portfolio Page the user will be redirected to the journey.

The Impact

With Scalable portal, INT. ensured a smooth user experience and increased workflow efficiency.

A remodelled intuitive web portal with user control and scalable capabilities is making the interface accessible. Following are the impact observed:

- Integrating with other solutions helping users in finding it easier to navigate and facilitate the actions.
- A better engagement on the portal has been reported.
- There is increase rate of interaction by the users on the portals and prefers it than doing it through the third party solution providers.
- Responsive portal helped in increasing the speed of the transaction
- Scan code has helped users in login to the platform without any difficulties
- Integrating various payment gateways is making the transaction easier and quicker.

Product Glimpse

The image displays two overlapping screenshots of the SBI Mutual Fund website's user interface, focusing on the portfolio management section.

Top Screenshot (Right): Shows the 'Your Portfolio' overview. The current value is ₹1,21,648, with a 30% Debt and 70% Equity allocation. A tip suggests switching ₹36,000 from equity to debt. Summary statistics include: Current Value ₹1,21,648, Invested Amount ₹1,20,000, Annual Return ₹21,646, Absolute Return ₹22,646, and Absolute Change 8.24%. A 'New Investment' button is present.

Bottom Screenshot (Left): Shows a detailed view of the portfolio with a sidebar menu (Dashboard, Portfolio, Transact, Plan Goal, Profile, Watchlist, Transaction History, Get Statements, Help). It features a 'Filter' section and a list of schemes:

- OnePlus TV:** 24% Achieved | 16% to Go. Status: On track. You're doing great, your investment for OnePlus TV is on track!
- SBI Magnum Tax Gain Scheme - Regular Plan - Dividend:** NAV: ₹1,249.7 (+1.2%) as on 12 Feb | 250,782 Units. Current Value: ₹5,648, Absolute Returns: +₹5,648 (8.24%), Invested Amount: ₹5,648, Dividend Earned: ₹5,648.
- SBI Magnum Medium Duration Fund - Regular Plan - Growth:** NAV: ₹1,244.7 (+1.2%) as on 12 Feb | 254,584 Units. Current Value: ₹36,000, Absolute Returns: +₹3,000 (8.24%), Invested Amount: ₹33,000.

At the bottom, a message states: 'Manage multiple accounts under one roof. You can track and manage the investments of your family members.'



We Deliver
#DigitalSuccess

INDIA | UK | USA | AUSTRALIA | SINGAPORE

23+
Years

750+
Professionals

11k+
Projects

6m+
Hours

We are a team of digital engineers working towards innovation, reinvention and reshaping business models. We cater to multiple enterprise clients, fast growing product companies, digital agencies operating in the domain of banking, insurance, finserve, health, professional services and others in more than 45 countries.