



# DIGITIZING INVESTMENT & WEALTH MANAGEMENT FOR A LEADING BFS INSTITUTION

Google

4.0 ★★★★★☆

Clutch

4.9 ★★★★★☆

glassdoor

4.5 ★★★★★☆

Countries we operate from



# PROBLEM STATEMENT



A major private-sector bank with a growing High Net-Worth Individual (HNI) and affluent customer base faced challenges in delivering modern, digital-first investment services:

Insufficient compliance tracking affects responsiveness.

Inconsistent investment experiences across assets.

Manual processes delay recommendations.

Lack of a unified view for managers.





INT. launched an **Investment & Wealth Management Platform** that unified portfolio visibility and advisory tools.

- ✓ **Wealth Overview:** Get a view of your investments: mutual funds, fixed income, equities, PMS, insurance, and gold.
- ✓ **AI Advisory :** Receive tailored suggestions for rebalancing and thematic investments based on your profile.
- ✓ **User Experience:** A platform for Relationship Managers with insights and for investors with DIY options.
- ✓ **Transactions:** Facilitate transactions across products like mutual funds and bonds.
- ✓ **Compliance:** Use a suitability engine to capture risk profiles.



# 6-Step Applied Process

01

## **Journey Mapping :**

Defined journeys for investors, RMs, and HNIs across onboarding, advisory, and transactions.

02

## **Integrated Architecture:**

Built APIs to connect MF, PMS, custodian, and broker systems.

03

## **RM Enablement:**

Deployed tools for nudges, profiling, and recommendation workflows.

04

## **Compliance Wrappers:**

Automated SEBI-aligned suitability and disclosure checks.

05

## **Analytics Engine:**

Enabled real-time insights, triggers, and benchmarking.

06

## **Engagement Boosters:**

Gamified dashboards and goal trackers to drive usage.



**3.5x**

**increase in RM-led investment**  
conversions via intelligent prompts  
and client portfolio insights

**100%**

**compliance with suitability norms**  
and SEBI audit trails via embedded  
wrappers

**71%**

**digital adoption in investment**  
transactions across mutual funds and  
FDs post-platform launch

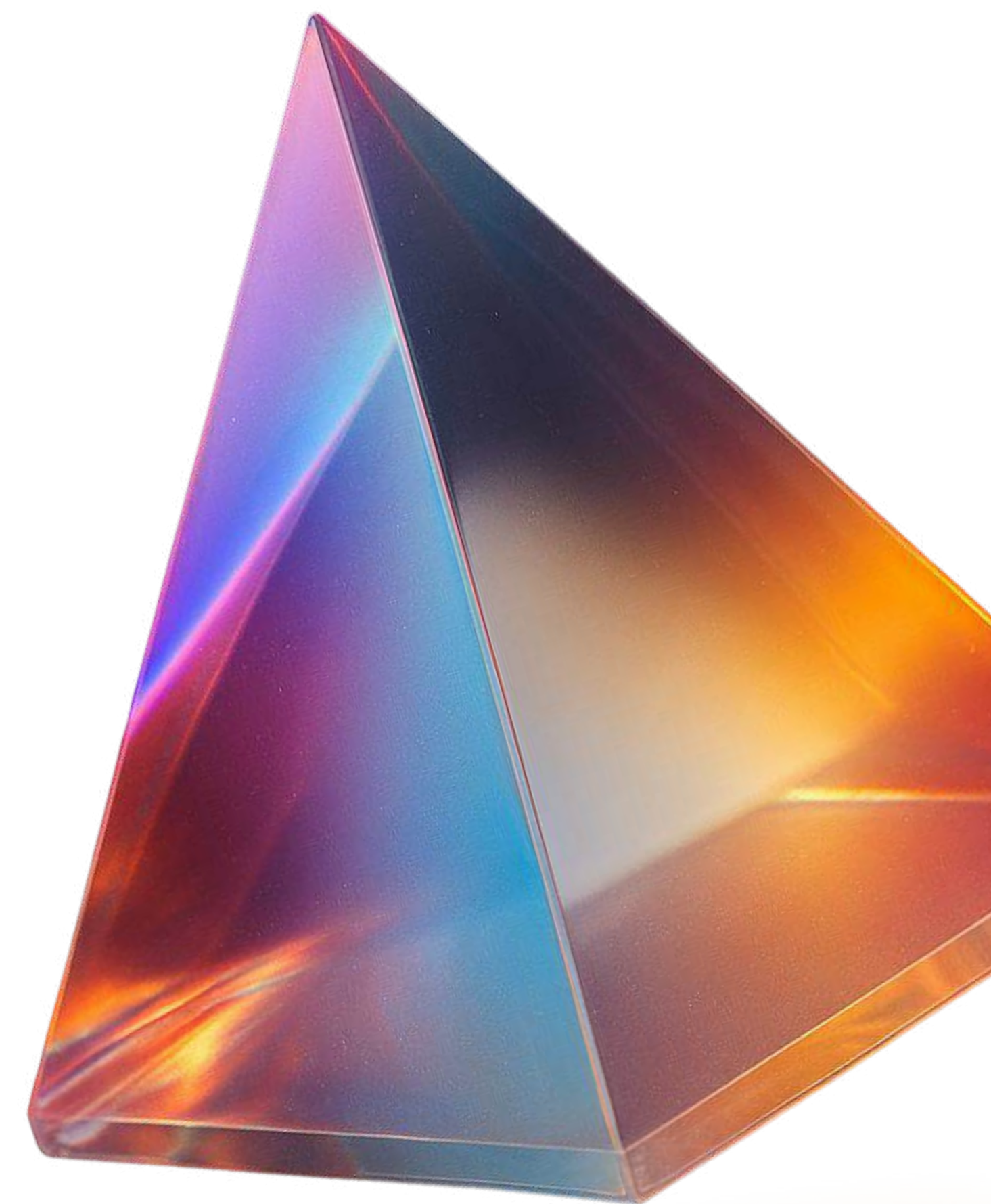
**2.2x**

**growth in AUM-per-client** among active  
investors using goal-based portfolios

**62%**

**reduction in TAT for onboarding**  
new investors and executing  
transactions

**Significant uplift in** investor  
satisfaction, driven by  
transparency, personalization,  
and channel convenience







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**27+** Years

**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 27 years, over 500 clients, and 11,000 plus client projects. INT. operates at the confluence of Data, technology, and marketing in the digital space.

