Experience
Transformation
Trust, Technology, Thought Leadership

A Comprehensive Wealth Management Platform.

www.kfintech.com/mpower-wealth

KFINTECH
EXPERIENCE TRANSFORMATION

Here for **you.**

Experience **Transformation**

Trust, Technology, Thought Leadership

Transformation is not a future event.
For us, it is NOW!

At the core of KFintech's ethos is our track record of disruption through transformation.

Trust

Leadership is an achievement of Trust.
For us, it's in our culture.

KFintech is the partner of choice for over 450 funds across the globe with nearly 100% retention.

Technology

It is not that we use technology.
For us, technology is a way of life.

KFintech blends decades of asset management expertise with transformative platforming & big data solutioning.

Thought Leadership

Thought leadership is not about being known.
For us, it's about being known for making a difference.

KFintech is the industry leader in rolling out several industry-first platforms and features for all asset classes.

Welcome to
KFin Technologies Limited

KFintech is a trusted solutions provider for wealth managers, bringing modern technology enabled solutions to help solve operational & mission critical challenges that might hinder your business growth. As an innovative leader in the asset and wealth management space, KFintech has led the digital transformation of more than 450 funds globally by partnering with them to build a sustainable business whose pillars are streamlined processes, smooth operations, and reduced costs. We decipher the complexities of changing global alternatives and provide fit-for-purpose solutions and diverse insights to wealth managers.

> **“We currently serve 489 funds with a 36.2% market share, managing a total of ₹1164.5 bn AAUM.”**

We combine technology and services with data aggregation and analytics while managing complex strategies with our simplified wealth management solutions.

Our Story in Numbers

We serve 489 funds, capturing a 36.2% market share.

We help manage assets worth ₹1167.5 billion for AIF and WealthManagement solutions.

We help process over **21 lakh transactions** per day.

We are the **#1 Corporate Registrar** in India, servicing 6,319 corporates with a 46.4% market share.

One of the Three CRAs, KFintech is a leader in NPS with shortest account opening time and industry first paperless onboarding

KFintech services 25 of the 47 Indian **Mutual Fund AMCs.**

We are the #1 RTA in the SEA region. We emerged as the transaction processing platform of choice in South East Asia, serving 24 mutual funds & pension manager clients in Malaysia.

Our Values

KFintech's core values are designed and internalized to shape the culture and define the character of our organization.

Our converging set of core values is our pole star, guiding how we act and how we make decisions. We are forever committed to the cause and always act with integrity and in compliance with the law.

01 **Client success**
Deliver to delight

02 **Respect for people**
Value and celebrate individuality and togetherness

03 **Innovate and be exceptional**
Challenge the paradigm

04 **Will and skill to win**
Foster the culture to win and wanting to win

05 **Lead with integrity and live by compliance**
Think and act based on values

06 **Unhinged accountability**
We are that passionate

07 **Evolve, on demand**
Nimble and fluid, stay ahead of the game

Challenges in Wealth Management

Whether you are a bank, a retail wealth outfit, a private banker, or a family office, operational challenges that hinder your business growth when it comes to wealth management are always undesired.

Customer Onboarding

The current ecosystem is long, tedious, and manual. Inadequate document retrieval and document expiry tracking is also a roadblock in staying compliant with internal and external guidelines.

Customer Insights

Multiple systems are needed to understand the customer profile, current investments, goals & aspirations to plan their investments as per the investment horizon and liquidity needs.

Omnichannel Solution

Accessibility and transit of data across multiple channels is a challenge. Due to multiple legacy systems, the in

Technology Handicap

A large wealth outfit or bank requires integration with their core CRM, financial systems, and marketing tools to provide complete data insights to the advisor as well as the customer.

New Products & Services

Wealth managers look to retain the customers by providing superior returns with new services. Wealth management systems require configurable modules to offer these products across channels.

Portfolio Analytics & Decision Making

Without an integrated portfolio analytics tool, wealth managers cannot efficiently analyze the current portfolio as well as build proposals for the customer for efficient portfolio management.

Regulatory Burden

Wealth managers must track portfolios as per the risk profile and investment guidelines and manage the business within the regulatory and internal risk limits.

Introducing mPower Wealth

In the dynamic landscape of wealth management, delivering comprehensive solutions demands a platform that transcends traditional boundaries. Introducing KFintech's mPower Wealth, an integrated wealth management solution designed to empower Banks, Wealth Managers, Portfolio Advisors, Multi-Family Offices, and Private Bankers.

mPower Wealth is more than just a platform; it's a strategic tool. This end-to-end, omni-channel solution seamlessly integrates front, mid, and back-office operations, automating processes for unparalleled efficiency. With its multi-asset, multi-currency capabilities and robust configurability, mPower Wealth is a versatile tool to navigate the complexities of the financial world.

mPower Wealth is a unified platform whose dedicated advisor workstation provides a 360-degree view of clients, enabling you to excel in customer onboarding, portfolio analysis, transaction execution, proposal creation, fee management, and performance evaluation. By seamlessly integrating with global and domestic third-party systems, mPower Wealth ensures you stay ahead of the curve.

Distribution Revenue Management	Advisor Workstation	Digital Onboarding & KYC
Portfolio Performance & Benchmarking	Multi-Asset Integration	Portfolio Optimization & Modelling
Investment policy statement & Risk Profiling	Model Portfolio Tracking & Rebalancing	Online Transaction Execution
Multi-Currency Flexibility	Reports & Analytics	Investor Portal
Held Away Assets	Transaction Management	

Key Features of mPower Wealth

Digital Onboarding & KYC

The platform streamlines client onboarding process by collecting necessary information electronically. The maker checker module verifies client identity and conducts Know Your Customer (KYC) checks to comply with regulations. This reduces paperwork and manual data entry errors, leading to efficiency and transparency.

Investment Policy Statement & Risk Profiling

The platform has a questionnaire-based risk profiler to assess the customer suitability in terms of their risk tolerance and risk appetite. It has detailed IPS management where in the customers. Constraints and requirements are tracked against the portfolio exposure and the platform notifies the advisors on potential over/under exposure of the portfolio against the IPS.

Model Portfolio Tracking & Rebalancing

The platform manages and tracks the investment portfolio based on the asset allocation defined in the model portfolio. Periodic re-balancing can be tracked, and the advisors are notified in advance of any fortnightly re-balancing activity.

Held Away Assets

The system tracks assets held outside the preview of primary investment account and provides a bird's eye view on client's overall investments. This helps wealth managers in making informed investment decisions for their clients.

Online Transaction Execution

The platform allows clients to execute transactions online conveniently while providing real-time access to market information. This way, mPower Wealth improves client experience and engagement.

Portfolio Performance & Benchmarking

To help wealth managers track investment performance against benchmarks, mPower Wealth's attribution analysis module analyzes factors driving returns and provides insights into portfolio performance and investment decisions. Wealth managers can analyze this data to improve and optimize their portfolio's performance.

Reports & Analytics

The system generates comprehensive reports on investment performance, asset allocation, and financial planning in a single click using which wealth managers can get actionable insights for clients & advisors for informed decision-making.

Portfolio Optimization & Modeling

The system analyzes investment portfolios to identify potential improvements and optimization opportunities. Using this, wealth managers can create hypothetical portfolio scenarios to test different investment strategies and build efficient & diversified portfolios.

Investor & Advisor Portal

The platform also comes with a secure platform for clients and advisors to access information and communicate with different role-based logins. The dedicated advisor workstation provides a 360° view of clients, execute transactions, and do portfolio analysis and performance evaluation.

Solution Overview

Global Wealth Management & Family Office Product Framework

Customer Portal	Client Management	Client Onboarding	KYC & Documentation	Family Hierarchy	IPS / Suitability	RM Creation & Hierarchy	RM Workstation
Portfolio Snapshot	Portfolio Management	Portfolio Creation	RM/Portfolio Mapping	Model Portfolio Mapping	IPS/ Restrictions Creation	Goal Planning & Tracking	Customer & Portfolio Analytics
Family Level Reporting	Transaction Management	Cash/Security Inward	Order Management	Compliance & Limits Management	Trade Execution & Confirmation	Model Portfolio Creation	Customer 360 Degree View
Online MF Transaction	Back Office Process	Stock & Cash Settlement	Corporate Actions	Valuation & EOD Process	Portfolio Re-Balancing	Product Analytics	Back Office Reports
Portfolio Performance	Portfolio Reports	Portfolio Statements	Stock/Cash/ Revenue Reconciliation	Compliance Reports	Management Reports	Portfolio Accounting	Online MF Transaction
Mobile App	Interfaces	CRM Systems	SMS / Email	Market Data Providers	Core Systems	Active Directory	Distribution Revenue

Peripheral Systems **Modules** ← **Sub-Modules** → **Peripheral Systems**

mPower Wealth

Asset Classes Covered

Equity

- Listed Direct Equity
- Mutual Funds
- Managed Accounts

Alternatives

- REIT / InVits / Real Estate
- Private Equity
- Venture Capital
- Hedge Funds
- Commodities
- Digital Assets

Derivatives

- Option Embedded Bonds
- Exotics
- Structured Notes
- Warrants
- Interest Rate Swaps
- Forward Rate Agreements
- Exchange Traded Futures
- OTC Products
- Currency Futures

Debt

- Bonds & Debentures
- FRNs
- Mutual Funds / CIS / Convertibles
- Exotic Bonds
- Foreign Currency Bonds
- Structured Products
- Loans
- Discounted Instruments

Technology Capabilities

- Database Agnostic – Choice of Oracle, Postgresql, MS SQL, MySQL
- On Premise / Cloud / SaaS-Based Deployment
- Event driven framework enabling pro-active alerts and notifications
- Parameterized Implementation of Business Rules
- Microservices and API-Based Architecture
- Integration Ready with Major Reference Data Providers
- Multi-Channel Support

Evolutionary Platform	Horizontal & Vertical Scalability	Advanced Security Standards
Built on cutting-edge technology. Offers hyper-personalization, immersive visualization, seamless integration, and holistic sentient AI.	Grows with your business Handles increasing data and user volumes without compromising performance.	Adheres to security standards like OAuth 2.0, OWASP Protocols, and DSS. Includes historization and audit trails.

Plug & Play	Continuous Innovation	Intuitive User Interface
Flexible and adaptable to different infrastructure setups. Compatible with various client database stacks.	Incorporates latest technology and industry best practices. Addresses evolving market needs based on user feedback.	User-friendly design Customizable dashboards and workflows.

Experience
Transformation
www.kfintech.com

Contact Details

Senthil G. CFA, CIA
Chief business development Officer

+91 9833349146
senthil.g@kfintech.com

Praveen Telagamsetty
Head of Pre-Sales

+91 77024 96222
praveen.telagamsetty@kfintech.com

KFINTECH
EXPERIENCE TRANSFORMATION

Registered Office

301, The Centrium, 3rd Floor, 57,
Lal Bahadur Shastri Road, Nav Pada, Kurla (West),
Mumbai – 400070, Maharashtra, India

Email Id : **compliance.corp@kfintech.com**
Telephone : **+91 22 46170911**

Scan the QR
For more details.