



“Combining the best of both the worlds  
**FIN+TECH.**”

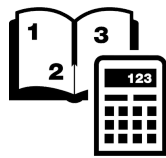
We are a new-age fintech company focused  
on developing fintech products & solutions



Wealth  
Management



Investments



Financial Planning



Insurance



Financial Education

Our **Product philosophy** is inspired by our vision to “**Help businesses & people achieve their financial goals**”



What sets **us** apart?

- Domain Expertise
- Client Focus
- High performance teams
- Technical Excellence
- Ability to innovate
- Reliability & integrity



# OUR FINTECH PRODUCT SUITE



## Advisor Assisted

A B2B2C Integrated Digital Platform for Financial Intermediaries & Enterprises, Wealth Managers & Financial Advisors

### Planning & Advisory Suite

Goal Planning, Portfolio Management & Financial Planning Modules

### Transactions Suite

Enabling paperless transactions for MFs and other Investment products

### Business Suite

Sales Management & CRM, Back office Integrations, MIS etc.

### Advanced Mobile App

Track Bank Accounts, Credit cards, Wallets, Budgets, Bills, Multi-asset portfolio etc.

White-labelled, Cloud based platform available as SAAS

### Enterprise Versions Available

For enterprises with Customizations & Integrations with existing systems

**API Stack Available** ✓

## Do-It-Yourself (DIY)

Digital Platform with Financial Planning & Client Suitability Assessment for Large Enterprises like Life Insurers, Banks, Asset Management Companies

A 360° financial planning & suitability assessment digital platform with simple, intuitive & engaging DIY User Journey

Recommendations for Budgeting, Life Goals, Debt Management & Risk Management

Recommend Savings / Investment based products as well as Protection based solutions

Analysis of Current Financial Situation, Family & Life Stage needs and Risk Appetite

Instantly generate the Financial Planning / Suitability Plan Report

Integrations with existing Product subscription / quote generation process & easy customizations

API Stack Available 



A B2C Account Aggregation & Money Management  
App for Working Individuals powered by AI & ML

A highly automated, simple and  
secure Mobile App helping users  
track their personal finances

Track personal / business expenses  
& income as per category and their  
trends , manage budgets

Enterprise version available with  
sdk integration

256-bit encryption and bank grade  
security for client data protection

Track bank accounts, credit cards,  
wallets and detailed account  
statements without sharing pin or  
password

Track utility and other bills through  
auto-reminders and pay online  
instantly

Track Multi-asset Portfolios real-time  
- MF, Equity, FDs, Small Savings  
Schemes etc.

**API SDK Available** ✓

Other Financial Tools & Calculators for Banking, Investments, Insurance, Account Aggregation, Knowledge Management etc



Financial Product calculators e.g. deposits, bonds, small savings schemes, retirement schemes, investment products etc.

Life Insurance Benefit Illustration calculators

Financial tools & calculators for budgeting, goal planning, debt management etc.

PDF parsers for eCAS PDF statements for Auto-upload of Client Portfolios

Tools for Risk Profiling & Assessment of Individuals

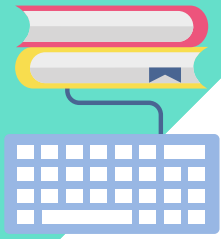
Mutual Fund Analysis and Recommendation as per SEBI categories with detailed product one pagers

Financial Tools for Life Insurance, Health Insurance & other insurance need assessment

Enterprise versions available with API & sdk integration

**API stack & App SDK available** ✓

**“We specialize in building custom fintech solutions for Banks, Insurers, AMCs and other Large Enterprises”**



## OUR EDUCATE PRODUCT SUITE

A B2B2C Multi-lingual L&D Platform for BFSI and other sectors available across device platforms

Ideal App for Employee Training, Channel Partner Training Or Client Education

Content, Quiz & User MIS supported by a powerful Content Management System

Multi-lingual App (English, Hindi and other languages)

Track user engagement, time spent, modules accessed etc.

Ability to showcase content in multi-media formats (Infographic, Video, Audio etc.)

Customizations & Integrations with existing Client Apps / Websites / Intranets etc.



MCQ based Quiz format to track user learning with national / regional / profile level score tracking and rankings


Drive Business & People Objectives @ lowest cost per user.

**API stack & App SDK available** ✓

## Finlabs India Pvt. Ltd.

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