



Finlabs India Private Limited

Enabling Financial Wellness Through Technology



The Leap of Faith

In **2016**, we walked away from our cushy corporate lives, driven by the urge to build something of our own.

Cracks Beneath the Surface

Our deep dive into the **BFSI space** revealed gaps and inefficiencies that couldn't be ignored.

When Vision Turned to Action

The two founders joined forces, ready to shake things up—and **Finlabs** began to take shape.

Technology with a Mission

From day one, our focus has been clear: **Simplify finance through smart, holistic tech solutions.**

HOW IT ALL BEGAN

A VISION TURNED REALITY

Nimish Agrawal
(Founder & CEO)

Sudipto Roy
(Founder & Director)



THE WHY:

CHALLENGING BFSI LANDSCAPE



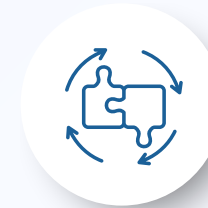
**Increasing regulatory
changes and costs**



**Complex Legacy
Infrastructure**



**Lack of Digital & Tech
penetration in BFSI**



**Fierce Competition with
Fintech**



Siloed Chaotic Data



**High Costs for Product
Development, Increasing
TAT**

THE WHAT: EMPOWERING YOU TO GROW YOUR BUSINESS



OUR PROPOSITION

- Readymade Product Stacks
- End-to-end Solution Development & Support
- IT Services

OUR STRENGTHS



Business Domain
Understanding

Product Accelerators
+
Startup Ecosystem

Technology Consulting
& Execution

OUR FOCUS SEGMENTS



Wealth
Management



Asset
Management



Retirement
& Pension



Insurance



Financial Literacy
& Education



THE HOW:

Product Suite



finexa Designed to simplify operations, enhance client engagement and, accelerate business growth.



finexa FOR MF DISTRIBUTORS



Portfolio
Management

Invest / Buy Mutual
Funds

Financial Planning
& Monitoring

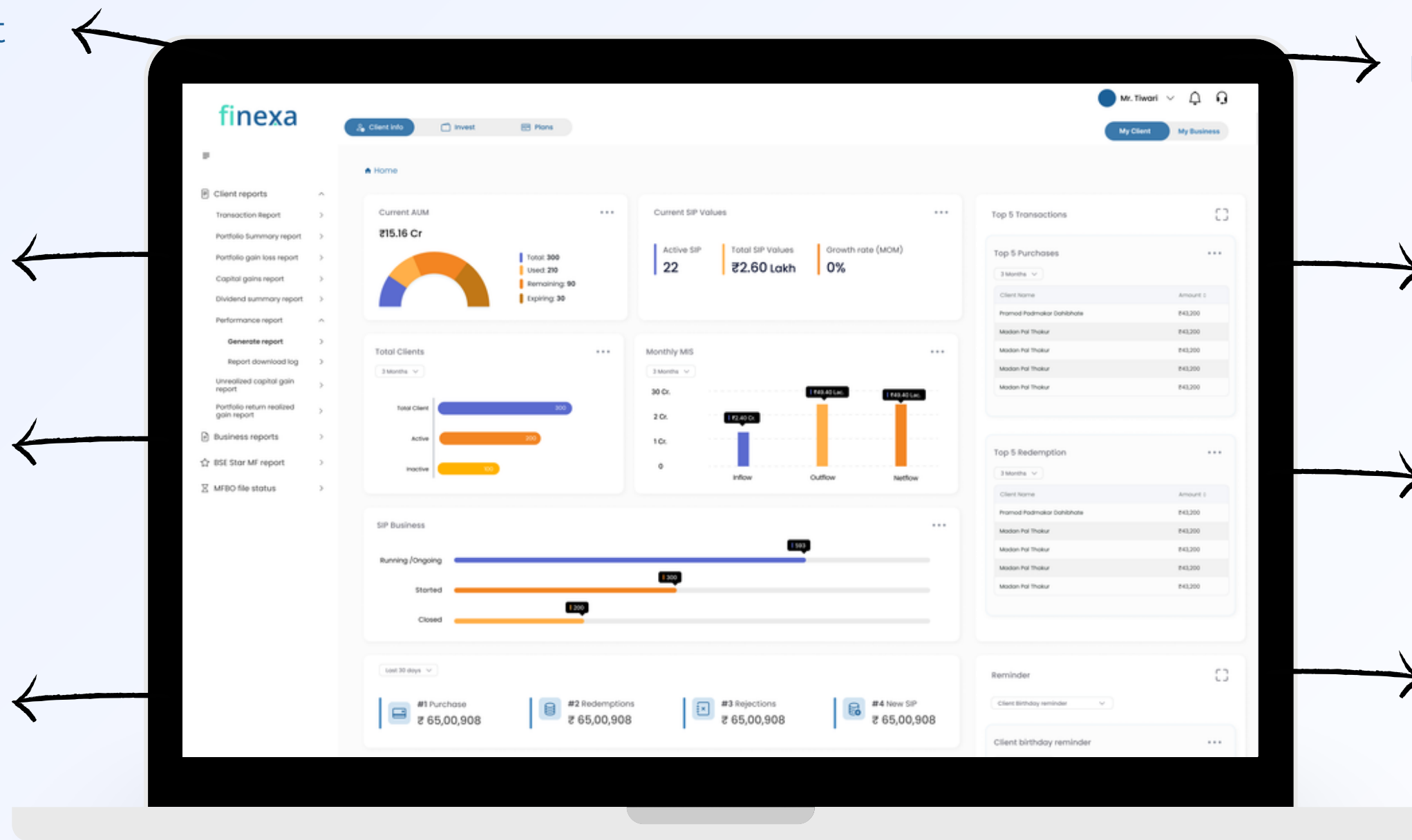
Transaction through
BSE Star, NSE and MFU

Goal Planning &
Tracking

Multiple ARNs on
one dashboard

Portfolio Tracking &
Analytics

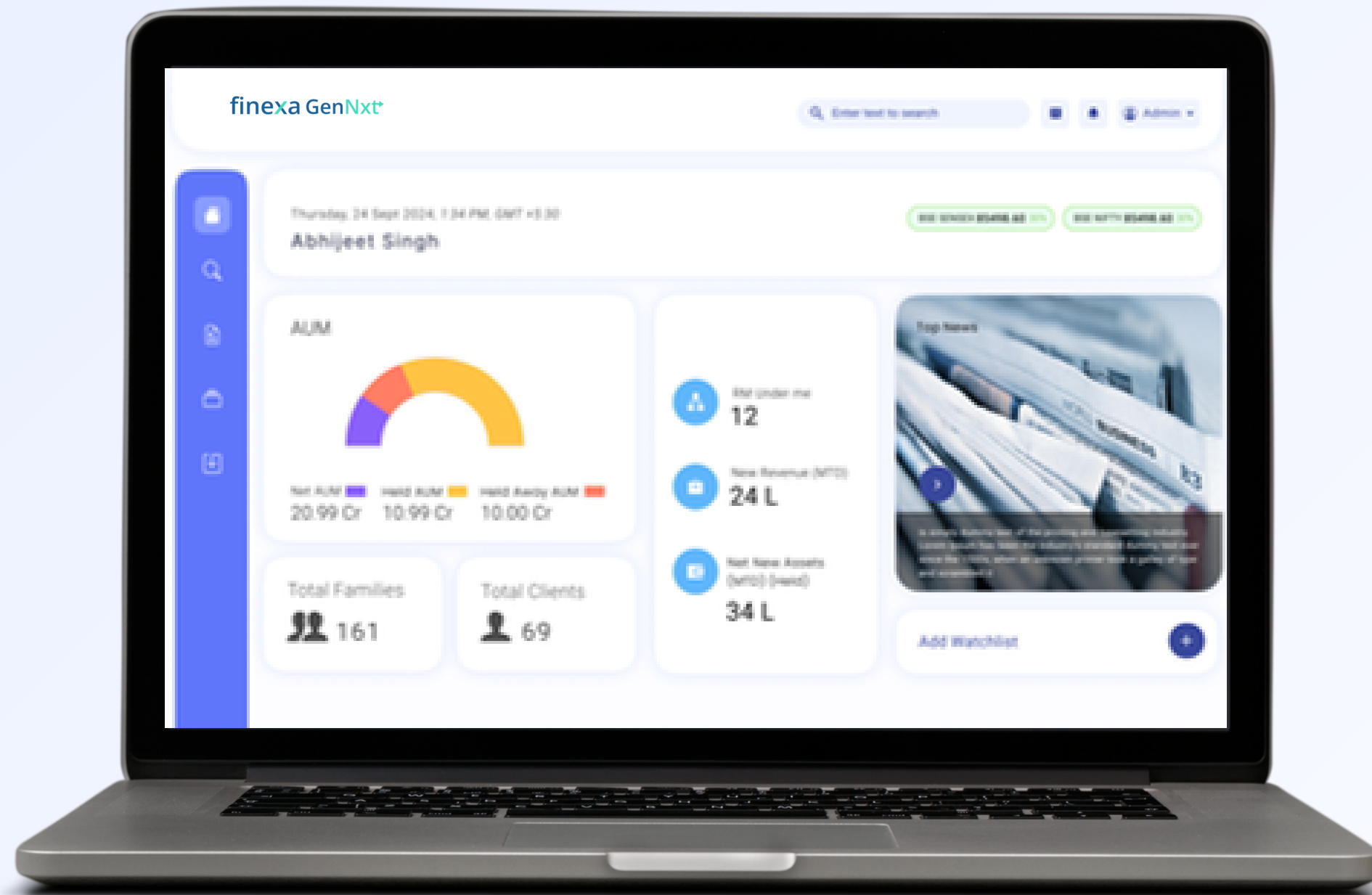
Investor Onboarding,
KYC & Profiling



**Available on Android
and iOS for clients
and MFDs.**



Watch Now



01

Multi-Asset Data Aggregation

Consolidated portfolio data for accurate insights

02

Reporting & Analytics

Real-time data visualization and performance tracking

03

RM & Client Dashboard

Complete overview for RMs & Clients

04

Model Portfolio Building & Goal Planning

Goal Planning, Goal Tracking and portfolio analytics

05

Revenue Management

Comprehensive revenue tracking and reconciliation tools

06

Online MF Transaction Suite

Seamless Transactions (BSE Star/MFU Integration)



Our **comprehensive** and **scalable platform** is tailored to meet the varied requirements of modern enterprises, providing a seamless and effective learning journey for everyone involved.

 Watch Now



THE DIGITAL INVESTOR AWARENESS PROGRAM MANAGEMENT PLATFORM

Investor Awareness, Simplified for AMCs

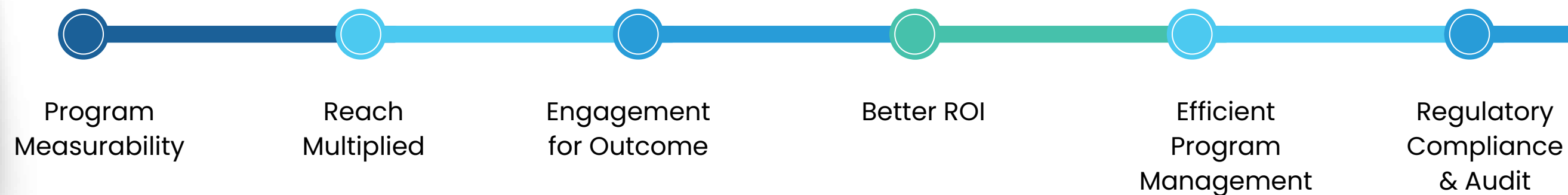
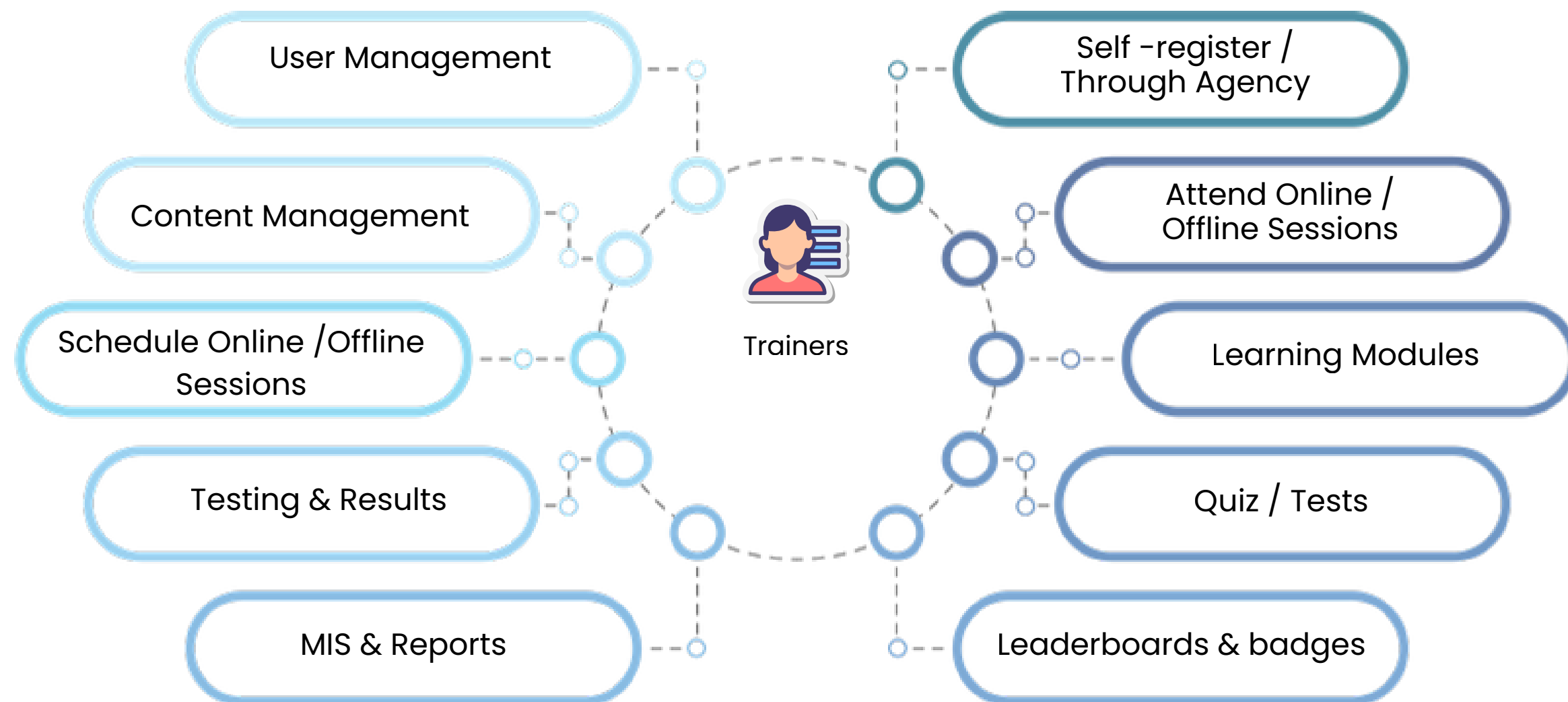
 Watch Now



IAP Admin Team



Beneficiaries





Driving Innovation Through Finance



OUR APPROACH TO TECH

01



Solutions out of the Box

- Ready API Stacks
- Scalable microservices architecture
- Quick customization & integration
- Agile implementation
- On-premise/cloud deployment
- Enterprise Grade Security
- Flexible ownership models



02



Expertise across SDLC

- **Consulting**
Digital strategy, BPR, architecture, specs
- **Software Development**
Application build & maintenance
(fixed/time-based)
- **Quality Assurance**
Test cases, automation, QA services



03



Tech Stack Expertise

- **Main Platforms**
Java, Python, PHP, PostgreSQL, MongoDB, Node.js, etc.
- **Web Technologies**
HTML5, React, Bootstrap, Django, etc.
- **Mobile**
Android, iOS, Flutter
- **Tools**
Selenium, JUnit, JMeter, Jenkins, Git, JIRA
- **Cloud**
AWS, Azure, Google Cloud, Salesforce

SOLUTIONS OFFERED



Robo Advisory

Intelligent Robo-Advisory Services

Stay ahead in the financial landscape with this intelligent and adaptive Robo-Advisory platform

NPS Suite

Smarter Retirement Planning Made Simple

A seamless solution designed to simplify retirement planning

Data Analytics and Visualization

Strategic Data Analytics

Our robust analytics enable you to derive actionable insights and drive strategic planning

Document Management System

Robust management of critical documents

Simplify your workflow with smart, secure, and accessible document management

ReguSure

Regulatory Compliance Automation

Mitigate risks and maintain trust with this reliable compliance automation solution

[Explore other solutions](#)

OUR SERVICES

Technology Consulting

- UI/UX Consulting
- Application & Infra Audits
- Cybersecurity
- Cloud Architecture Review
- Digital Transformation Strategy

Managed Services

- **Cloud Focused Support**
Whether it's deploying, managing, or optimizing cloud infrastructure, we stand ready to drive your organization's success.



Technology Implementation

- Digital Assets Development
- Process Automation
- Analytics Capability
- QA Automation

GCC services

- End-to-End GCC Setup via BOT Model
- Deep Domain Expertise in Fintech & Compliance
- Tech-Driven Innovation Hubs

SUCCESS STORY



Digital Transformation in Wealth Management

Finlabs revolutionized a leading NBFC's wealth operations by automating client onboarding and compliance, reducing processing time from days to under an hour.

[Know More](#)

Empowering Learning Through Technology

Enabled 5,000+ students with 24/7 access to industry-relevant, interactive content through a customized LMS platform.

[Know More](#)

OUR ESTEEMED CLIENTS

Esteemed Clients

AMC



Regulatory Bodies



NBFCs



Banks



Stock Exchange



Insurance Company



Pension Fund Manager



Law Firms



CRA



AI Company



Wealth / Investment Firms



Educational Foundations



OUR ESTEEMED PARTNERS



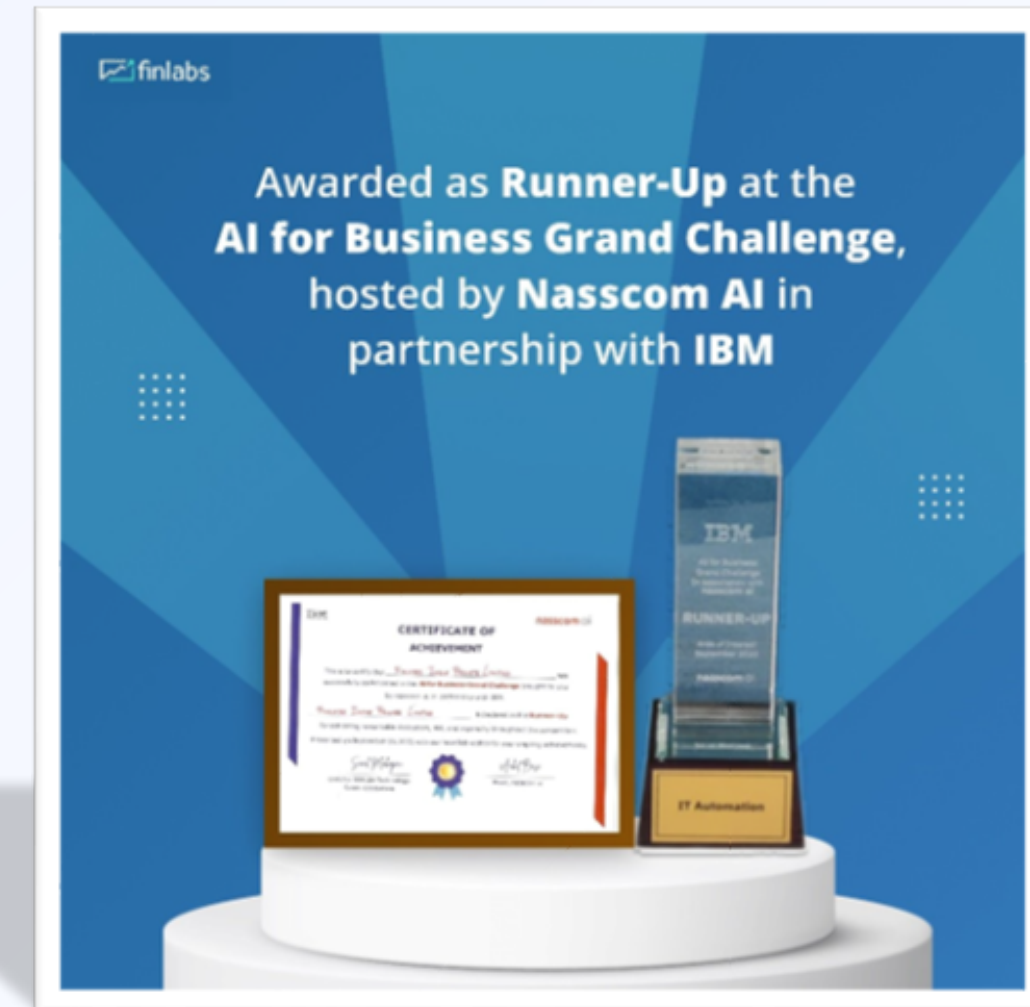
Partners



DATA &
ANALYTICS



RECENT ACCOLADES



BOARD OF DIRECTORS



Sudipto Roy (Founder & Director)

30+ years in Indian financial markets | Ex-MD, Principal Retirement Advisors [Know more](#)



Nimish Agrawal (Founder & CEO)

20+ years in Product, Marketing & Fintech Development [Know more.](#)



Ajay Mahajan (Director)

30+ years in BFSI | Leadership roles at Bank of America, Yes Bank, [Know more.](#)



Kavita Lakhani

30+ years in PR & digital marketing | Ex-President, WICCI, [Know more.](#)



Supratim Bandyopadhyay (Director)

35+ years in Insurance, Finance & Investments | Ex-Chairman, PFRDA | Former LIC Leader, [Know more.](#)



Lalit Vij

30+ years in Financial Services & Insurance | Ex-MD, Principal PNB AMC | COO, Luthra & Luthra, [Know more.](#)



Amit Sinha

35 years in the financial services sector, Architect of NPS | Expert in Social Security & E-Governance, [Know more.](#)

ADVISORY BOARD



Samipendra Chaudhury

EVP Operations Reworld Waste
(New York, USA), [Know more.](#)



Rajib Chakravorty

Global Banking Data Mgmt.
Specialist (London, UK), [Know more.](#)



Rajan Krishnan

Ex-CEO & MD of BOB Pioneer
Asset Management, [Know more.](#)



Prosenjit Gupta

Ex- Sr. GM – Treasury at HDFC Ltd.
Now an advisor , [Know more](#)



Gautam Bhatikar

25 years of dual-qualified
experience in India and England
Partner, Phoenix Legal, [Know more.](#)



Pradeep Mukerjee

Ex-CEO Mercer India & Head
HR Citibank, [Know more.](#)



Nandip Vaidya

Program chair, MSc. Finance,
NMIMS & Ex CEO Kotak PE, Kotak
Prime, L&T Finance, [Know more](#)



Anindya Dutta

MD, Two Roads PTE Ltd., Veteran
Banker DB, AMEX, ANZ, Best Selling
Author (Singapore), [Know more.](#)

SENIOR LEADERSHIP



Sudipto Roy (Founder & Director)

30+ years in Indian financial markets | Ex-MD,
Principal Retirement Advisors [Know more](#)



Nimish Agrawal (Founder & CEO)

20+ years in Product, Marketing &
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Ajay Mahajan (Director)

30+ years in BFSI | Leadership roles at
Bank of America, Yes Bank, [Know more.](#)



Hariharan Iyer (COO)

25+ years in operational excellence
and digital transformation in asset
management. [Know more.](#)



Ganesh Tawde (CDO)

28+ years in BFSI tech, with expertise
in Life, Annuity, Retirement & Wealth.
[Know more.](#)



Gaurav Suri (Chief Evangelist)

30+ years leadership in BFSI & FMCG
(UTIMF, MetLife, Britannia, Perfetti).
[Know more.](#)



Thank you

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Annexure



OUR SOLUTIONS: FEW USE-CASES



Client	Problem Statement	Finlabs Accelerator	Solution Provided	GTM
Oldest & amongst the Top 10 Asset Management Companies in India	Improve Client acquisition, upsell and retention through Digital Channels for both DIY (Investor) and B2B (Intermediaries) Journeys	Finexa Wealth management	Consulting on the Goal based Robo-Advisory Solution for both DIY and B2B • Methodology • Asset Allocation Models • UI / UX journeys • Tools & calculators etc	10 weeks
Largest Central Record keeping Agency (CRA) for NPS in India	Provide the Intermediaries (Banks) by providing digital B2B2C & B2C channel for processing Increase reach to Individual & Corporate NPS Subscribers	Finexa Wealth management & LearnGenie Learning Management	360-degree SDLC Solution Development • Multi-tenant System serving most leading banks in India • Front Office & BackOffice Processes • Enable B2C and B2B2C Digital NPS Journeys across devices • Subscriptions, Contributions, Book-keeping, etc.	Phase-1 40 weeks for Go Live.
Leading Non-Banking Financial Services Company in India	Creating Financial Literacy & Awareness for the Middle – Income Segment Clients for Client Acquisition & Retention	LearnGenie Learning Management	Mobile-based Learning App to promote Financial Literacy • Multilingual & Multimedia Support • Gamified Journeys • Tracking & Monitoring	12 weeks
Leading Bank sponsored AMC with Pan India presence	Empowering MFDs & Bank staff with knowledge based courses for mandatory certifications & self development	LearnGenie Learning Management	Device Agnostic Learning App with anytime anywhere access • Multimedia Content Support • Gamified Journeys & Leaderboards • Assessment & Certification • Usage Tracking & other Analytics	12 weeks

OUR SOLUTIONS: FEW USE-CASES



Client	Problem Statement	Finlabs Accelerator	Solution Provided	GTM
Leading D2C Life Insurer in India	Inability of the D2C Users in deciding the suitable Life insurance Solution for their needs	Finexa Financial Planning Stack	360-degree SDLC Solution Implementation for DIY Financial Health Assessment & Planning App • Client Profiling & Risk Assessment • Goal Planning including Retirement Planning • Insurance Planning • Recommendation of Suitable Investment & insurance products for all mapped goals	14 weeks
A new financial products marketplace from Ghana with plans to expand across other African Geographies	Intermediaries & Investors need guidance for deciding the appropriate products for their investment & insurance requirements on the marketplace	Finexa Financial Planning Stack	360-degree SDLC Solution Implementation for DIY Financial Health Assessment & Planning App & Integration with Marketplace • Client Profiling & Risk Assessment • Goal Planning including Retirement Planning • Recommendation of Suitable Investment & insurance products	• 12 weeks for Phase 1 • 4 weeks for Phase 2
2nd Largest NBFC in India with a network of more than 4000 branches	Paper based processes for Mutual Fund Onboarding, Purchase and other Backoffice activities impacting scalability, user experience and operations	Finexa Financial Planning Stack	Providing the Enterprise Finexa Mutual Fund Suite for B2B Channel covering 4000 branch users and hierarchy • Client KYC & Onboarding • Online Mutual Fund transactions across all MFs • Client Transaction Statements & reports • Backoffice Automation & MIS Reports • Brokerage Tracking	14 weeks

FINLABS NPS SUITE

