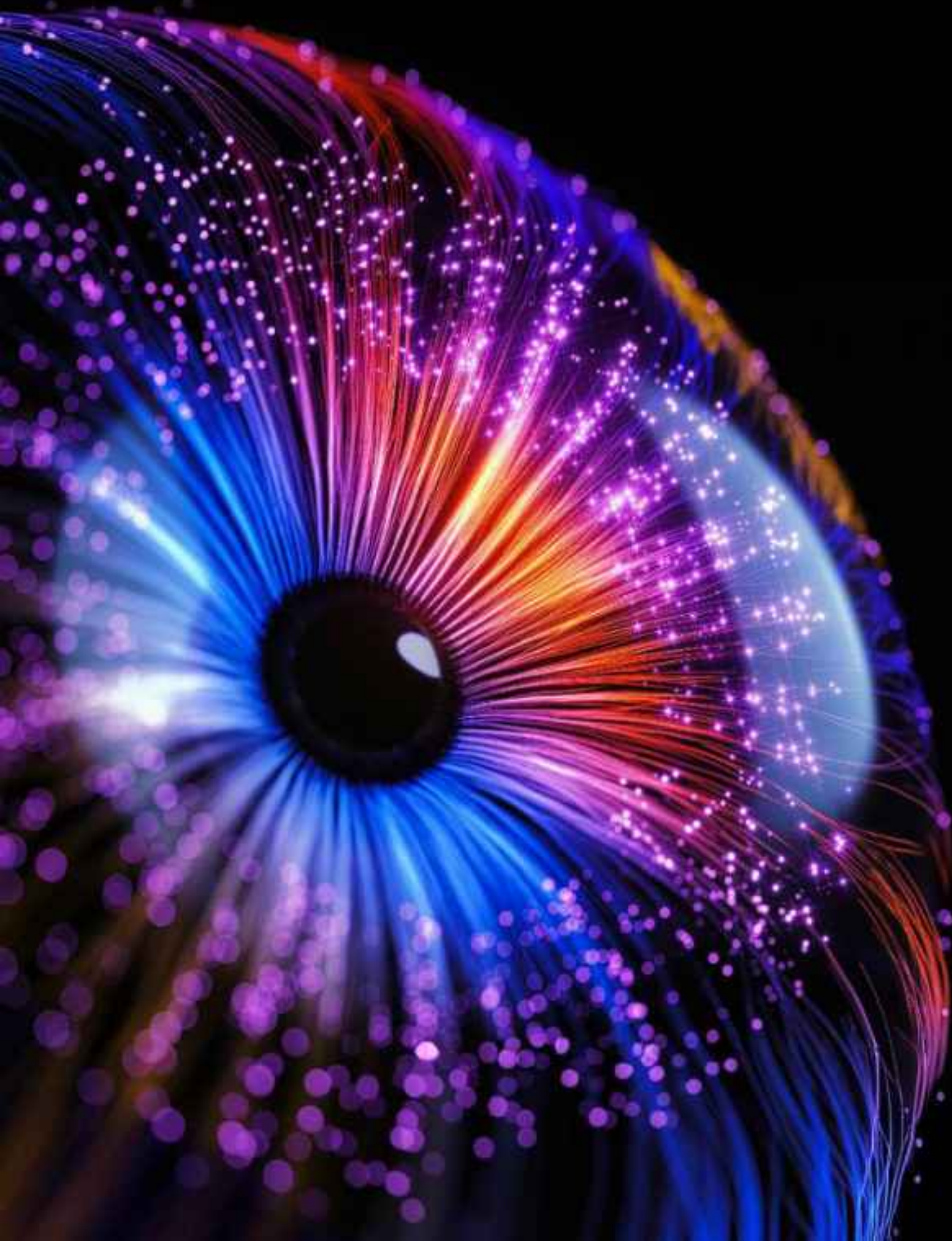


Comprehensive product and solution offerings





Welcome to **KFin Technologies Limited**

KFintech serves the mission-critical needs of asset managers with clients spanning mutual funds, AIFs (alternative investments), pension, wealth managers and corporates in India and abroad. We provide SaaS-based end-to-end transaction management, channel management, compliance solutions, data analytics and various other digital services to asset managers across segments, as well as outsourcing services for global players.

“ We currently serve over 300 million investors and process over 2.5 million transactions per day. ”

At KFintech, our vision is to be the trusted technology partner to all financial service providers. We aim to provide end-to-end tech services to all types of financial institutions.

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

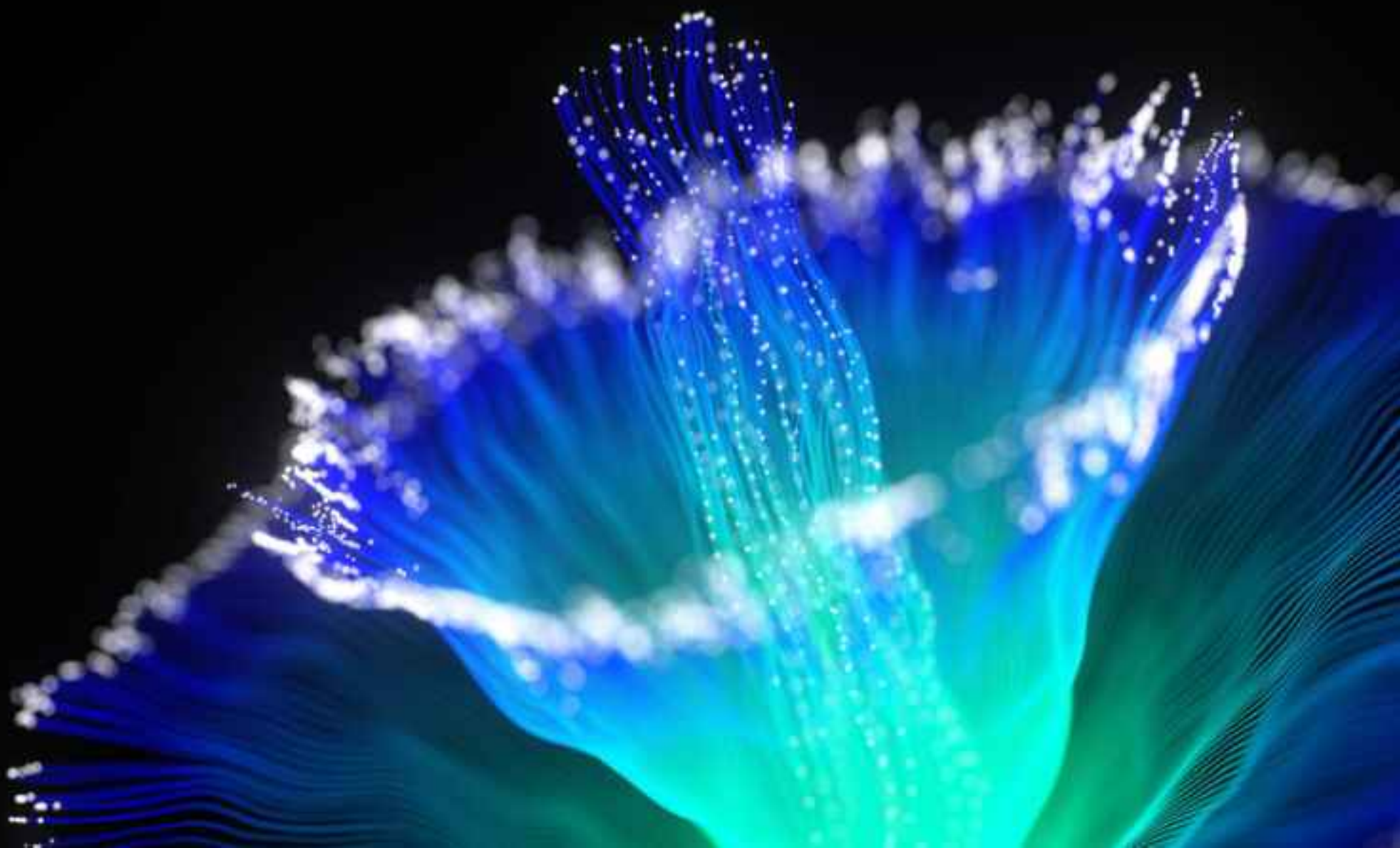
04 **Will and skill to win**
Foster the culture to win and wanting to win

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

Institutionalize Wealth Creation
Transform Corporate Financial Wellness





Group Systematic Investment Plan

Institutionalize Wealth Creation Transform Corporate Financial Wellness

Overview:

Group SIP is a pioneering solution tailored to institutionalize mutual fund investing within corporate ecosystems. It empowers distributors to embed SIP flows directly from employee salary accounts, catalyzing scalable, recurring investment volumes through a single corporate engagement.

STRATEGIC ADVANTAGES :

Corporate Embeddedness

Position yourself as a strategic wealth partner for enterprises, offering structured investment avenues that align with employee benefit frameworks.

Exponential SIP Scale

Drive consistent, long-term SIP inflows through a unified corporate interface amplifying AUM growth at reduced acquisition costs.

Seamless Execution

A fully digital, API-enabled platform ensures real-time onboarding, investment tracking, and compliance reporting.

Mutual Value Creation

Deliver tangible financial wellness outcomes to corporate employees, while fortifying distributor revenue through predictable flows.

Why It Matters

Group SIP redefines distribution by aligning personal finance with payroll infrastructure-creating a scalable channel for distributors and a high-utility benefit for corporates.

Digitize Discovery

Drive NFO Momentum with Precision





Digital NFO

Digitize Discovery Drive NFO Momentum with Precision

Overview:

Digital NFO is a high-impact, digital-first solution designed to turbocharge fund launches. It enables distributors to disseminate ARN-tagged subscription links instantly, optimizing NFO campaigns for reach, efficiency, and conversion.

STRATEGIC ADVANTAGES :

Frictionless Investor Access

Eliminate traditional onboarding lags—empower investors to participate through one-click journeys.

Real-Time Distribution

Amplify your market presence by broadcasting across digital, social, and messaging ecosystems.

Guaranteed Attribution

Every transaction is seamlessly mapped to your ARN—ensuring zero revenue leakage.

Conversion-Driven Design

Optimized UX to elevate investor confidence and accelerate decision-making.

Campaign Intelligence

Integrated MIS enables monitoring of traction, conversions, and investor behavior.

Why It Matters

In a fast-moving market, timing is everything. Digital NFO ensures you seize the moment—digitally, instantly, and at scale.

Command the Future of Distribution

One Platform | Every Possibility





IRIS

Command the Future of Distribution One Platform | Every Possibility

Overview:

IRIS is a comprehensive multi-asset distribution platform, engineered to unify product access, organizational control, and investor engagement in one seamless digital experience. Tailored for forward-looking distributors, IRIS is the foundation of next-gen advisory.

STRATEGIC ADVANTAGES :



Universal Asset Access

Execute transactions across mutual funds, NPS, FDs, AIFs (upcoming), and more—via a unified dashboard.



Enterprise-Grade Oversight

Establish team hierarchies, role-based controls, and performance analytics through advanced MIS.



Digital-First Operations

Simplify onboarding, servicing, and regulatory compliance with intuitive digital workflows.



Integrated Ecosystem

Connect effortlessly with KFinTech's broader product suite—Group SIP, DSS, NFO, APIs—for an end-to-end solution.

Why It Matters

IRIS is more than a platform—it's a growth engine for distributors seeking agility, scale, and long-term investor stickiness in an evolving wealth landscape.

Elevate Brand Authority

Engage Investors with Intelligence and Imprint





Co-Branded Templates & Product Links

Elevate Brand Authority Engage Investors with Intelligence and Imprint

Overview:

A branding enablement tool that empowers distributors to create and share co-branded AMC materials—elegantly designed, pre-approved, and investor-ready.

STRATEGIC ADVANTAGES:

Brand Amplification

Strengthen recall and recognition through consistent, visually polished collateral.

Rapid Customization

Eliminate design and compliance delays with ready-to-use templates and auto-tagging.

Investor Impact

Enhance perception and credibility with sophisticated, brand-aligned product communications.

Omnichannel Distribution

Share across digital, print, and social formats with a click.

AMC-Backed Trust

All materials are endorsed and aligned with AMC marketing standards.

Why It Matters

Perception shapes trust. This solution helps you communicate with clarity, authority, and brand alignment—without lifting a finger.

Real-Time Intelligence

Every Morning | Every Transaction





Daily Settlement Summary (DSS)

Real-Time Intelligence Every Morning | Every Transaction

Overview:

DSS is a consolidated, daily intelligence report that provides a panoramic view of your investor transactions and AUM movements—across all KFinTech-serviced AMCs.

STRATEGIC ADVANTAGES :

Actionable Visibility

Gain immediate clarity on inflows, redemptions, SIP lapses, and transaction exceptions.

Client Retention Engine

Act decisively with timely follow-ups and proactive investor outreach.

Operational Simplification

Replace fragmented data points with a unified, auto-curated dashboard.

System Integration

Easily ingest into your CRM or MIS for seamless internal workflows.

Predictive Planning

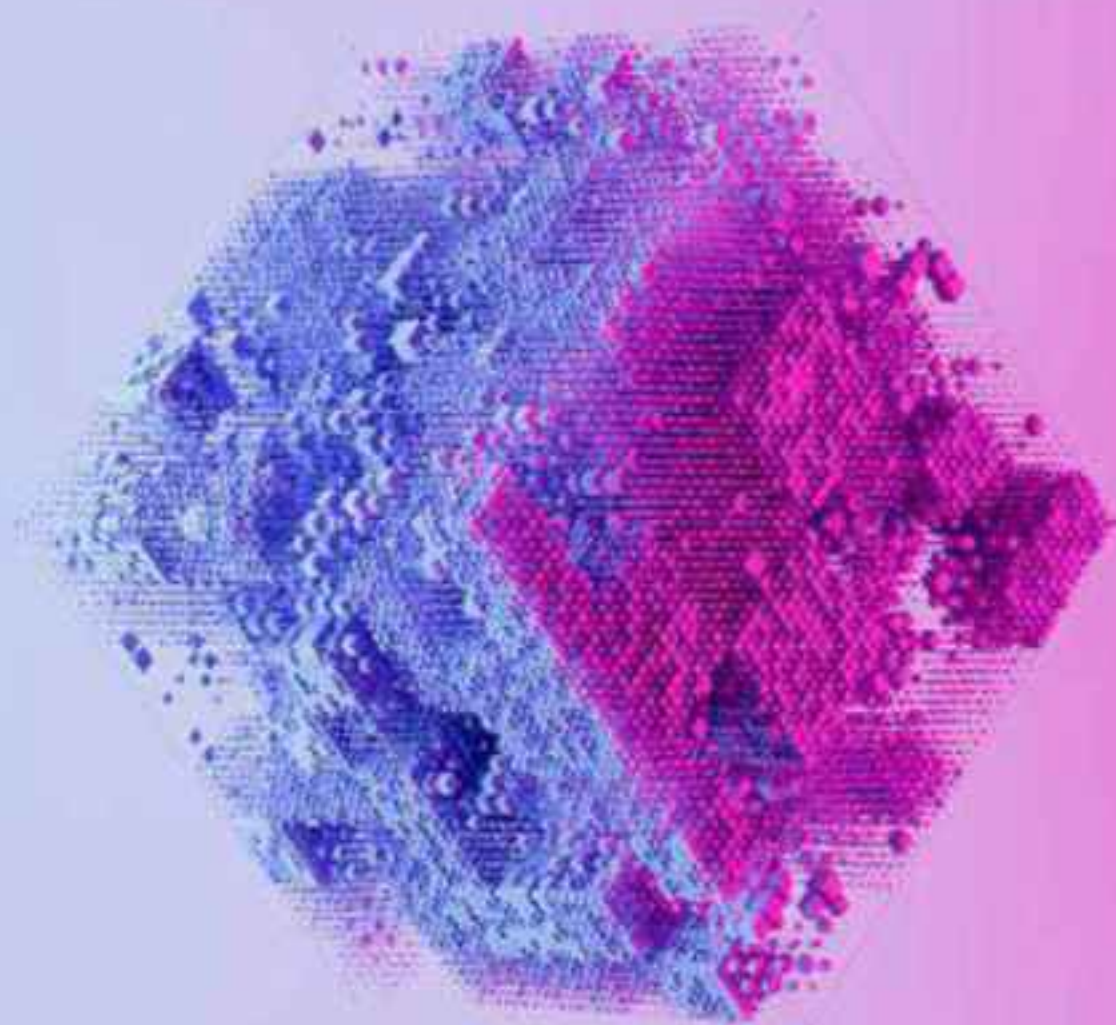
Use historical trends and real-time data to fine-tune strategy and engagement models.

Why It Matters

DSS delivers the insights you need, when you need them—fueling smarter decisions and stronger relationships.

Code Your Competitive Edge

Distribute Without Boundaries





KFintech & MF Central API Suite

Code Your Competitive Edge Distribute Without Boundaries

Overview:

A sophisticated suite of APIs that powers everything from onboarding and transactions to non-financial services and broker change requests—all through a single, standardized interface.

STRATEGIC ADVANTAGES :

Platform Agnostic Integration

Build your own digital experience across web, mobile, or advisory tools.

End-to-End Automation

Deliver seamless investor journeys with minimal manual intervention.

Zero Tech Redundancy

One API suite, multiple AMCs—reducing cost, effort, and risk.

Built-In Compliance

APIs include validation layers that eliminate rejections and ensure real-time auditability.

Next-Gen Capabilities

Push transactions, integrate payment gateways, and receive instantaneous status updates.

Why It Matters

In an API-first world, agility wins. This suite future-proofs your digital ambitions and positions you for scale.

Build What's Next | Together





Fintech Co-Creation Forum

Build What's Next | Together

Overview:

An innovation platform curated by KFinTech, bringing together distributors, fintech pioneers, and AMC partners to co-develop transformative distribution solutions.

STRATEGIC ADVANTAGES :



Early-Mover Intelligence

Access emerging prototypes, regulatory insights, and beta features.



Collaborative Problem-Solving

Solve ground-level challenges through shared ideation and experimentation.



Innovation at Source

Influence product development directly and align with regulatory frameworks from inception.



Strategic Networking

Engage with thought leaders and ecosystem stakeholders to shape industry direction.

Why It Matters

Co-creation accelerates innovation. Be part of the movement redefining distribution for the digital-first investor.

Your Data

Delivered in Real Time | At Enterprise Speed





Influx

Your Data | Delivered in Real Time | At Enterprise Speed

Overview:

Influx (Host-to-Host) is a premium data service that transmits real-time transaction, investor, and AUM intelligence directly into your systems—multiple times daily.

STRATEGIC ADVANTAGES:



Instantaneous Updates

Always work with the latest data—be it transactions, corrections, or redemptions.



Automated Continuity

Eliminate operational bottlenecks with zero manual reconciliation.



Elevated Client Service

Serve with precision—backed by always-on, always-accurate data.



Infrastructure Compatible

Easily integrates with existing CRMs, dashboards, and BI systems.



Regulatory Alignment

Secure, encrypted, and compliant with audit trail readiness.

Why It Matters

In a data-driven world, latency is the enemy. H2H empowers you to operate with clarity, speed, and absolute control.





What is KLOCK?

KLOCK (KFin Mutual Fund Operations Console) is a real-time, web-based operational intelligence platform built specifically for AMCs. It enables granular tracking of commercial and non-commercial transactions – including Purchases, Redemptions, Switches, SIPs, STPs, and SWPs – from initiation to closure. By combining live dashboards, transaction-level analytics, and process exception tracking, KLOCK transforms AMC operations from reactive to data-driven and proactive.

How does KLOCK empower your AMC?

Operational Intelligence	Process Visibility	Efficiency & Risk Mitigation
Real-time view of all MF transaction types, helping executives stay in control across distributed teams.	Step-by-step tracking of each transaction, with detailed views on rejections, deletions, and pending actions.	Exception alerts and bottleneck detection reduce manual intervention and operational exposure.

Additional features include:

- Centralized dashboards designed for fund managers and leadership to cut through the noise.
- Seamless integration with existing data models, zero disruption, faster insights.
- Full audit trail built-in for compliance peace of mind.
- Scales effortlessly as your AMC and transaction volumes grow.

Why choose KLOCK as your next operational edge?

KLOCK by Kfintech transforms fragmented transaction oversight into a near real-time, command-centre dashboard tailored for AMC operations. It empowers teams to respond swiftly, identify and resolve pending stages, and maintain tighter control across every scheme. With KLOCK, you're not just monitoring operations you're orchestrating them with efficiency and accuracy.

Investor Dynamics

AI-Powered Campaign Engine to Drive
Inflows, Retain Investors & Maximise ROI





What is Investor Dynamics?

Investor Dynamics is KFinTech's next-generation, AI-powered omni-channel campaign orchestration platform, purpose-built for AMCs. It enables advanced investor segmentation, churn prediction, and campaign execution across **email, SMS, push notifications, social ads, and chatbots**—all from a unified console. Powered by real-time RTA data and KFinTech's secure Data Lake, it delivers hyper-personalised investor journeys designed to scale AUM growth while protecting your existing book.

How does Investor Dynamics empower your AMC?

Growth Marketing	Churn Management	Campaign Intelligence
Segment investors by behaviour, transaction history and AUM potential for targeted upsell.	Predict redemption risk and automatically trigger retention campaigns.	Attribute campaign performance to actual inflows, redemptions and SIP activity.

Additional capabilities:

- **Propensity Modelling:** Identify investors most likely to start SIPs, top-up, or exit—enabling timely nudges.
- **Omni-Channel Execution:** Launch campaigns across platforms from one dashboard—ensuring brand consistency and reach.
- **AI-Generated Content:** Auto-generate SEBI-compliant communication tailored to investor profiles.
- **ROI Dashboards:** Track campaign costs vs. asset mobilisation in real time, enabling marketing budget optimisation.

Why choose Investor Dynamics as your next growth lever?

Break away from generic, one-size-fits-all marketing. Investor Dynamics brings precision, scalability, and accountability to your AMC's investor engagement strategy—boosting inflows, reducing redemptions, and transforming marketing from a cost centre into a growth engine.

Empowering Wealth Management with Innovation





Overview:

mPower Wealth by Kfintech is an end-to-end omni-channel, multi-asset, multi-currency wealth management platform with front, mid, and back-office modules with operational automation.

STRATEGIC ADVANTAGES :

Digital Onboarding

Fast, secure onboarding with integrated AML and KYC checks for regulatory compliance and enhanced client experience.

Compliance Limit Monitoring

Real-time monitoring with model portfolio tracking, risk profiling, and Investment Policy Statement (IPS) enforcement to ensure governance and adherence to mandates.

Trade Order Management

Comprehensive trade lifecycle support including online execution, reconciliation, and real-time valuations for multiple asset classes.

Investor Portal and Advisor Workstation

Intuitive dashboards offering detailed portfolio insights, enabling investors and advisors to collaborate efficiently and make informed decisions.

Advanced Analytics

Sophisticated portfolio optimization and rebalancing tools backed by data-driven algorithms to enhance portfolio performance and risk management.

Why It Matters

Empower your advisory and operational teams with mPower Wealth — the platform that powers smarter wealth management.

Revolutionizing Investment Strategy with Advanced Analytics





mPower Analytics

Overview:

Mpower Analytics is a comprehensive platform designed to transform your investment strategy with sophisticated, institutional-grade analytics and intuitive design. It empowers investors and financial professionals to make data-driven decisions and proactively manage their portfolios.

STRATEGIC ADVANTAGES :

Real-Time Portfolio Analytics

Provides dynamic performance tracking with customizable timeframes and multi-currency support, giving you a comprehensive view of global portfolios.

Advanced Risk Management

Offers robust tools like Value at Risk (VaR) analysis, stress testing, and real-time risk alerts to help you understand and manage portfolio risks proactively.

Portfolio Optimization

Utilizes AI-powered tools and Monte Carlo simulations for constructing and optimizing portfolios based on risk-return profiles and custom benchmarks.

Performance Attribution

Delivers a detailed breakdown of returns and risk contributions at both the sector and stock level, offering a complete picture of what drives your portfolio's performance.

Portfolio Builder

Features interactive tools for asset selection and allocation including Sharpe ratio optimization to help maximize returns while controlling risk exposure.

Why It Matters

Mpower Analytics enables you to optimize performance, gain professional insights, and stay updated with live metrics, ultimately powering smarter, more informed investment choices.



Experience Transformation

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