

Digitian Wealth Management Software

a digital customer facing platform



MAKING
YOUR BUSINESS
READY FOR
FUTURE

DIGITIAN® Group believes that **Digitians** (people who born on or after 2000) will shape the world digitally. Growing over the last decades in a superspeed - the world is becoming virtual and the speed zoomed during 2020-2021 due to pandemic with virtualization and dramatic changing of habits of people for meeting the needs of their Banking, Investments, Insurances, Payments - domestic and cross border, currencies, buy and sell of commodities and daily necessities, Social Media and streaming, everything is over the net and will increasingly happen more.

Digitian Investment Incorporated(DII), UAE has launched digital investment portal in 2020 world wide and its one of the unique Virtual Investment Platform where you can open accounts and transact digitally without any physical interaction with the customers. The software has been developed with technology partner and shareholder **Phoenix Softnet Pvt Ltd, India**. **Phoenix Softnet** is a boutique Software firm since 2000 supporting Mid-Sized banks, Mortgage Companies, Debt Collection Companies Broker communities etc through their customized developed software.

DII specially developed an online version of its core digital Investment platform as a **DIGITIAN Wealth Management Software (DWMS)**, a fully functional customizable software for Banks-Financial Institutions & Services and Insurance (BFSI) Segments.

DIGITIAN WEALTH MANAGEMENT SOFTWARE (DMWS)

(MULTI INVESTMENT TYPE- MULTI CURRENCIES- MULTI COUNTRIES)

DMWS is a digital wealth management platform which provides the BFSI client the opportunity with a Client facing interface to capture all investments of their customers – Equity, Bonds, Debentures, Currencies, Government Treasury Bills and Bonds, properties etc. It caters to various currencies of the world. It caters for investments in various countries. It provides client friendly Dashboards, and self-developed downloadable report options

Main Features :

- **Digital Account opening options**
- **Digital Agreement signing options** (*needs integration with DMS*)
- **Multi Investment Capturing options** : (*Master driven Investment class creation*)
(Equity, Bonds, Debentures, Currencies, Government Treasury Bills and Bonds, properties etc)
- **Multi Currency Options**
It can be configured in a Local Currency(LCY) and Investment in other currencies (USD EURO, GBP ..any currencies will be captured in FCY and then converted into LCY)
- **Multi Country Investment Options** :
It will help you to capture the client's investment country wise
- **Investor Profiling options and Investor Rating Options** (*Basic one, configurable as per client rule*)
This helps in predictive analysis for marketing and pushing investment products.
- **Investment Allocation Option**
Clients have the option to select investment allocation for each Investment Type and for each country. This will proactively allow client to do risk management and portfolio building.
- **Only Fund Transfer Option**
Needs to be linked to Transfer gateway.
- **Custodian and Broker Vendor Management**
This provides the flexibility to maintain market players in the investment arena. The same can be maintained country wise.
- **Investment Advisory, Research and Recommendation Functionalities**
This is a significant Functionality. The BFSI can upload complete Research Documents and the market offer for a particular Investment.
This will automatically appear to the Clients so that they can place buy and sell order online.
- **Buy and Sell functionalities of Investment** (*needs to be linked with the stock exchanges*)
Clients of BFSI can directly place order for purchase of Investments if they want from any place.
This is also a significant Functionalities.

- **Miscellaneous Income Entry option :**

Dividend Receipt, Interest receipt, Bonus shares, Right shares , Fees charging etc

- **Investment Ledger Engine**

A special ledger which only shows Investment Transactions. This could be an additional ledger over and above the core system. This brings clarity to the customers to see only investment related activities.

- **Interactive Dashboard**

The clients of BFSI will have unique Opportunity to get a 360 degree view of his Investment portfolio

- **Onscreen reports on Investment holding and Past Investment ([any format downloadable option](#))**

The clients will have the unique advantage of reviewing Gains/Losses under each Investment Type Head. All On screens reports are downloadable in different format

- **Security Features include Maker/Checker , Audit Trail, User Management, Password Management, Session Management,**
- **The wealth Management software can be integrated with the Current Website/ Internet Banking of the BFSI Clients**
- **It can interact with the core Banking/Legacy systems of the BFSI clients.**

Products Coverage :

1. **Equity**
2. **Debentures**
3. **Corporate Bonds**
4. **Mutual Funds (Unit Trust)**
5. **Government Treasury Bonds**
6. **Government Treasury Bills**
7. **Currencies including crypto**
8. **Deposits (Linked with core systems)**
9. **Properties**
10. **Gold/commodities**
11. **Fine Arts**

Client Type Coverage: (Customers Agnostic)

1. Individuals
2. SME
3. Corporates
4. Cooperatives
5. Micro Institutions
6. Any other types

Who can use DWMS ?

Banks, Brokers, Custodians, Insurance, Micro Institutions, Asset Management Companies, Investment firms, Private Equity Firms, Cooperative Societies, Pension Funds, Family office.

Specifications :

Front End : Asp.net

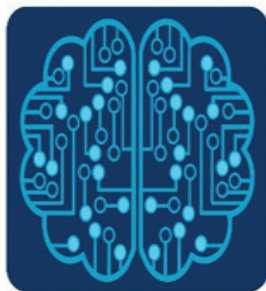
Database : MS SQL/ Oracle

Implementation Duration - Six months

1. Basic* Customized Software (with 3 products)- 3 months
2. Alpha & Beta Testing – 2 months
3. Integration with other vendors – 1 month

Contract Options : (in order of Ascending Price Scale)

- DWMS as a service - all hosting, support with DII – pricing user based
- DWMS as a Product License
- White Labelled product (License)- **Use your own logo and labels, support with DII**
- White Labelled product (Full purchase with Source Codes)- **initial 3 years support with DII**



DIGITIAN

The Digital Generation

DIGITIANS are those who are born in or after the year 2000 and will be a dominant force through 2075. They are completely different in usage of their left brain and motor nerves. They are different from the Millennials in behaviour, thinking and action.

The world is changing superfast – media, communications, banking, currencies, education, retail channels, health & medicines, travel and tourism, consulting, manufacturing, agriculture, – every sector is facing disruptive innovations; nano technology, internet of things, artificial intelligence and robotics will be overwhelmingly embedded. In this age, model disruption, extinction, miniaturisation, real time delivery, speed and virtualisation are new normals.

We make you ready for them



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