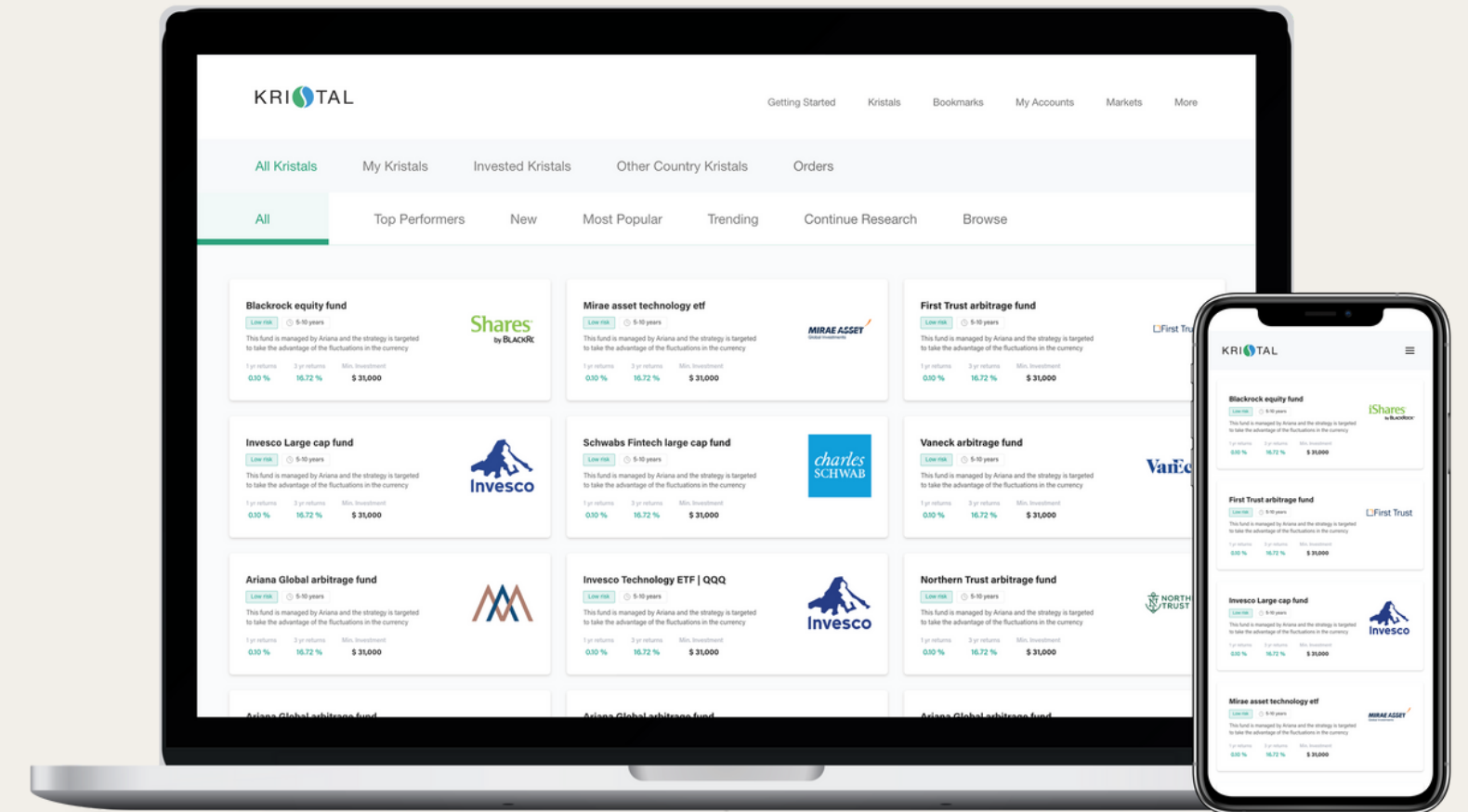


Kristal.AI Enterprise Solution

RM App for end-to-end client
management

MAY 2021 - CONFIDENTIAL



Company Registration Number: 201711235E

End-to-end client management solution

A one-stop destination to manage all your client information, onboarding, portfolio tracking, & management and communication needs.



Leads Management



Notes and Docs



Client Management



Portfolio Management



Analytics



Communication

Leads Management

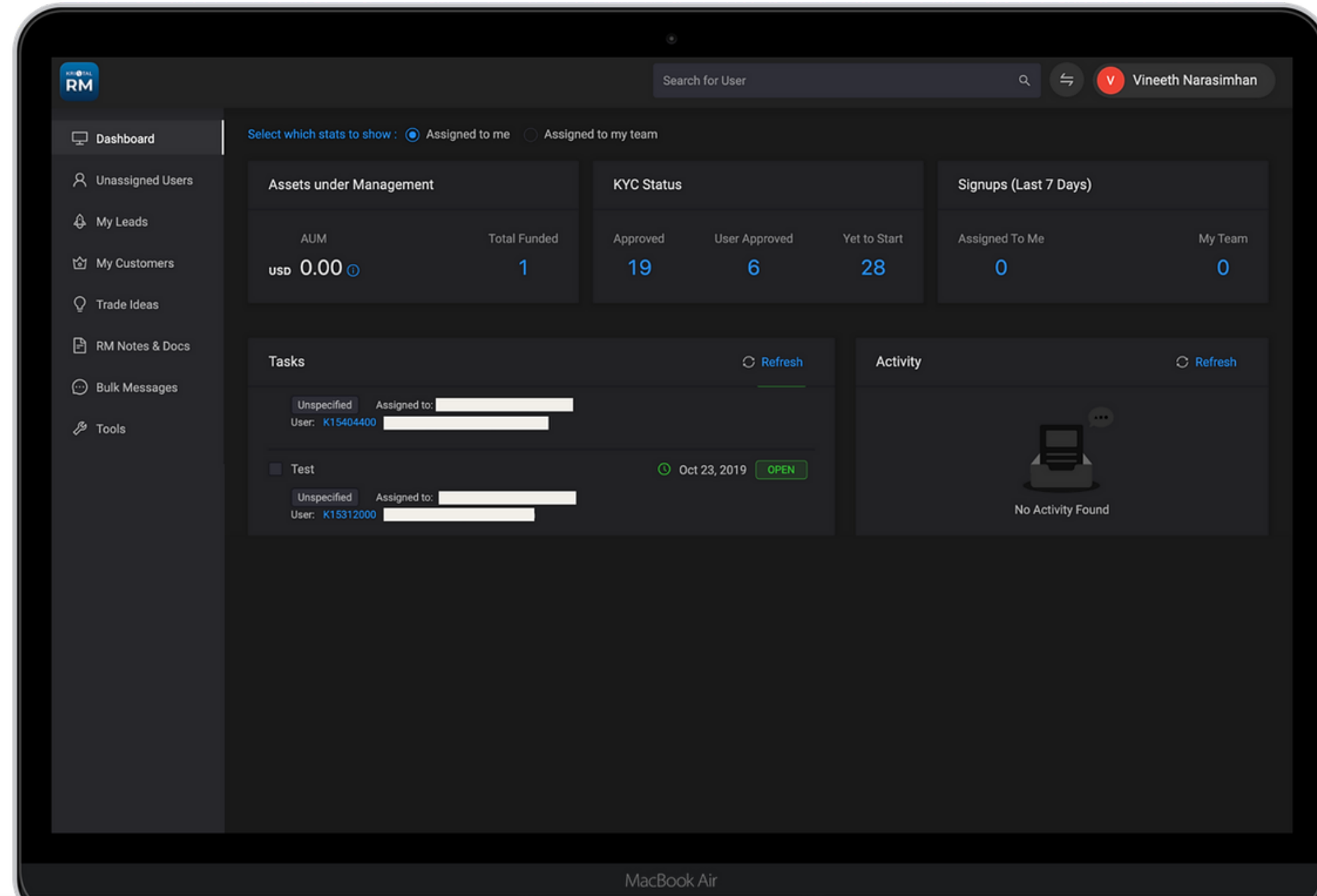
Track Leads and KYC status



Seamless Onboarding
and customised client
profiling



God's Eye View of
your business



Task Managements



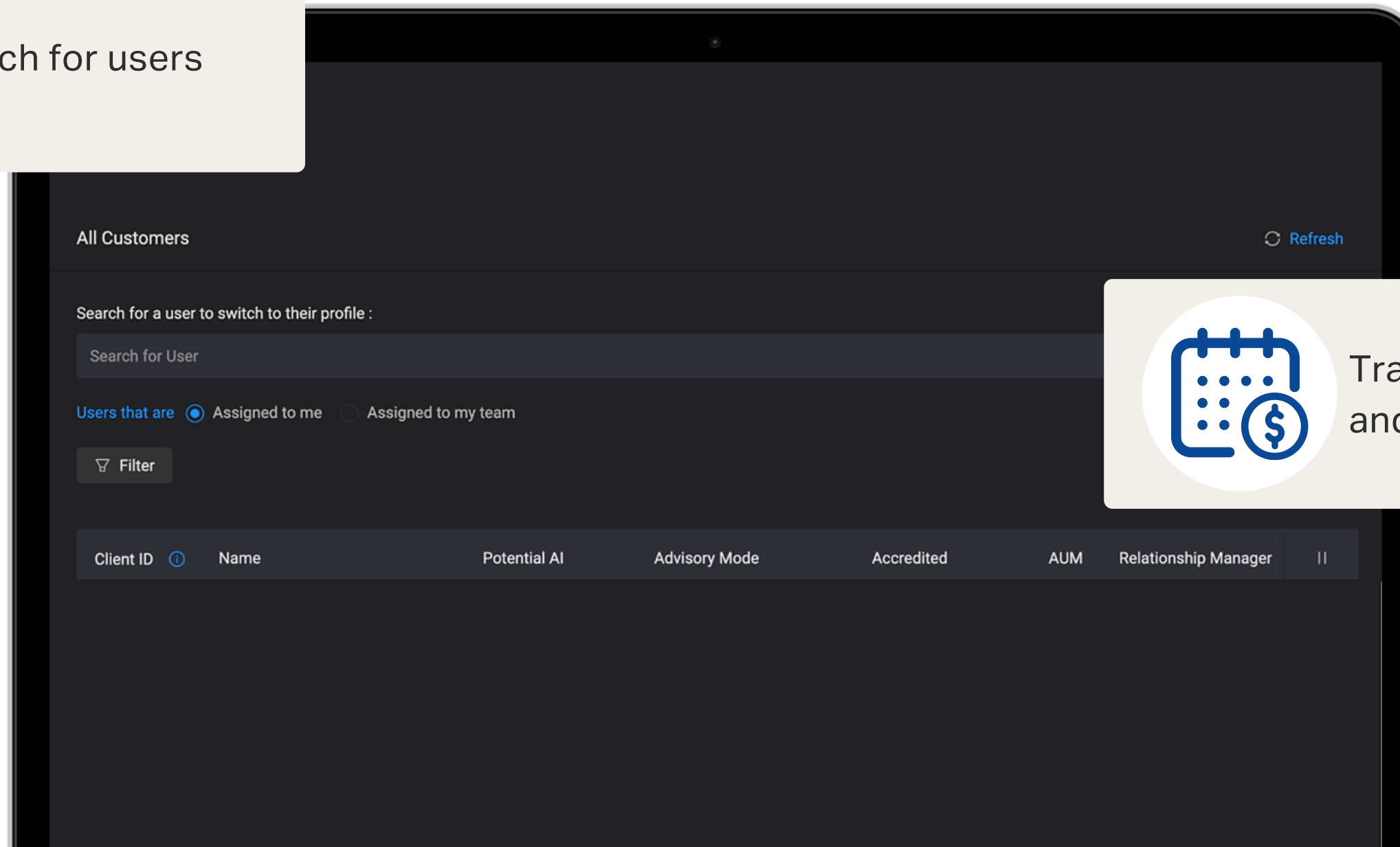
Assign Favourite users

Clients' Summary

All client details in one place



Advanced Search for users



Track Client Actions like AUM and Last Funding date

RM Notes & Docs

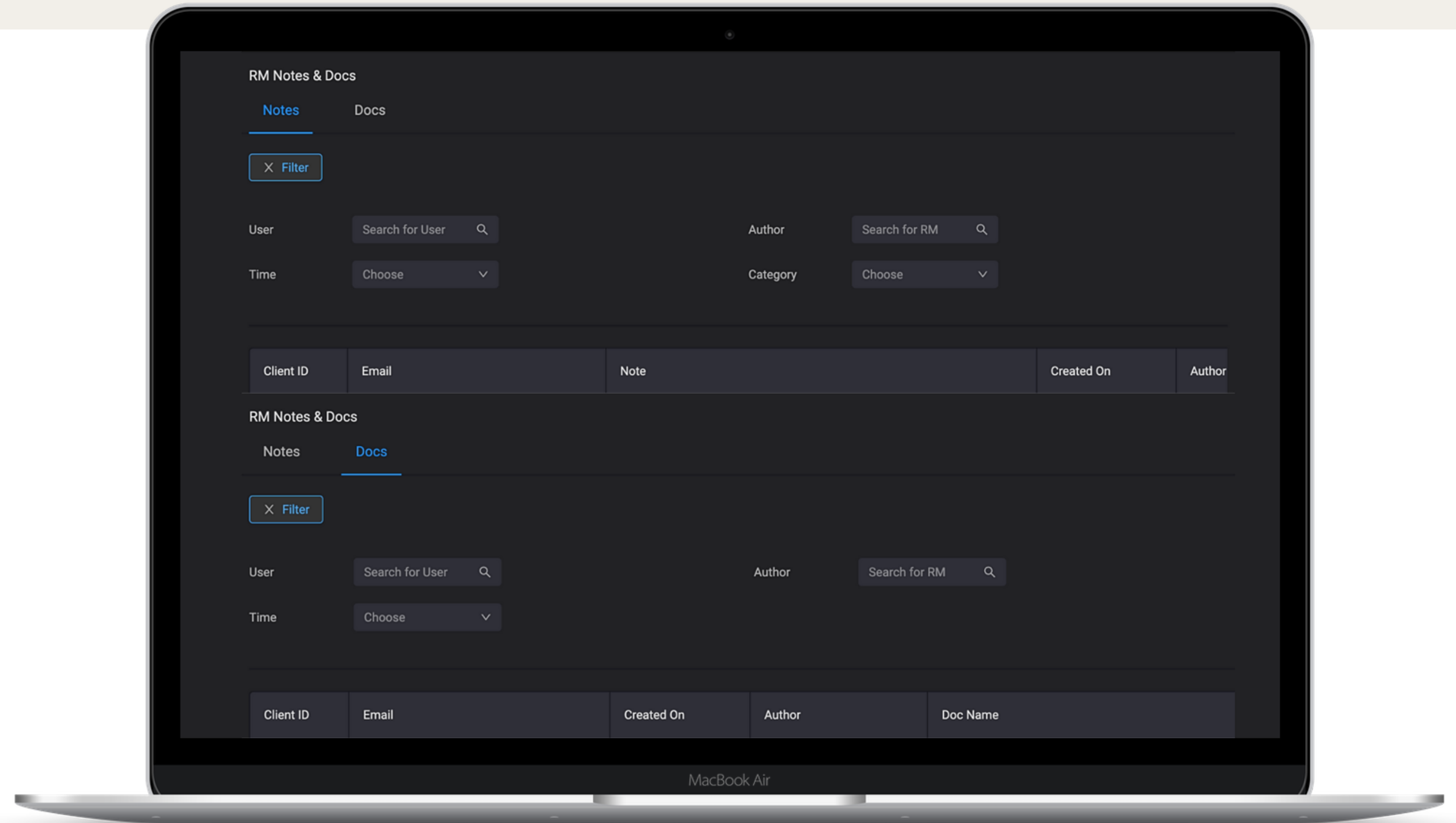
Add references for your internal consumption



All Client Documents at one place



Access all Notes & Documents in a few clicks



Client Communication

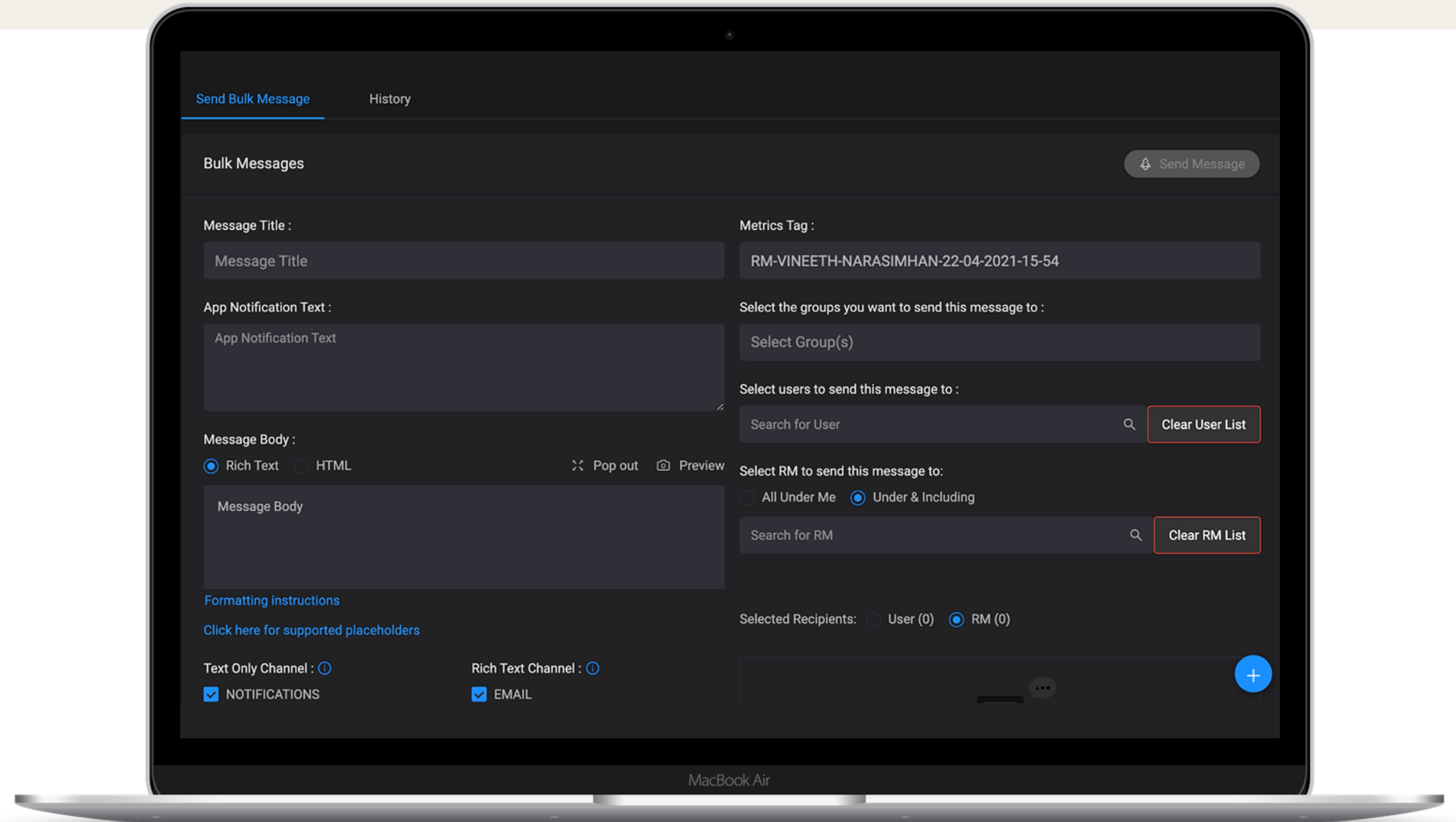
Create client groups for customised communication



No more searching for emails and text messages

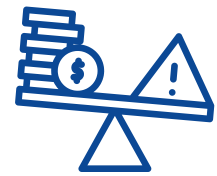


Reach out to clients with Rich Format Emails & texts



Analytics that Assist you!

Client Portfolio Information at your fingertips



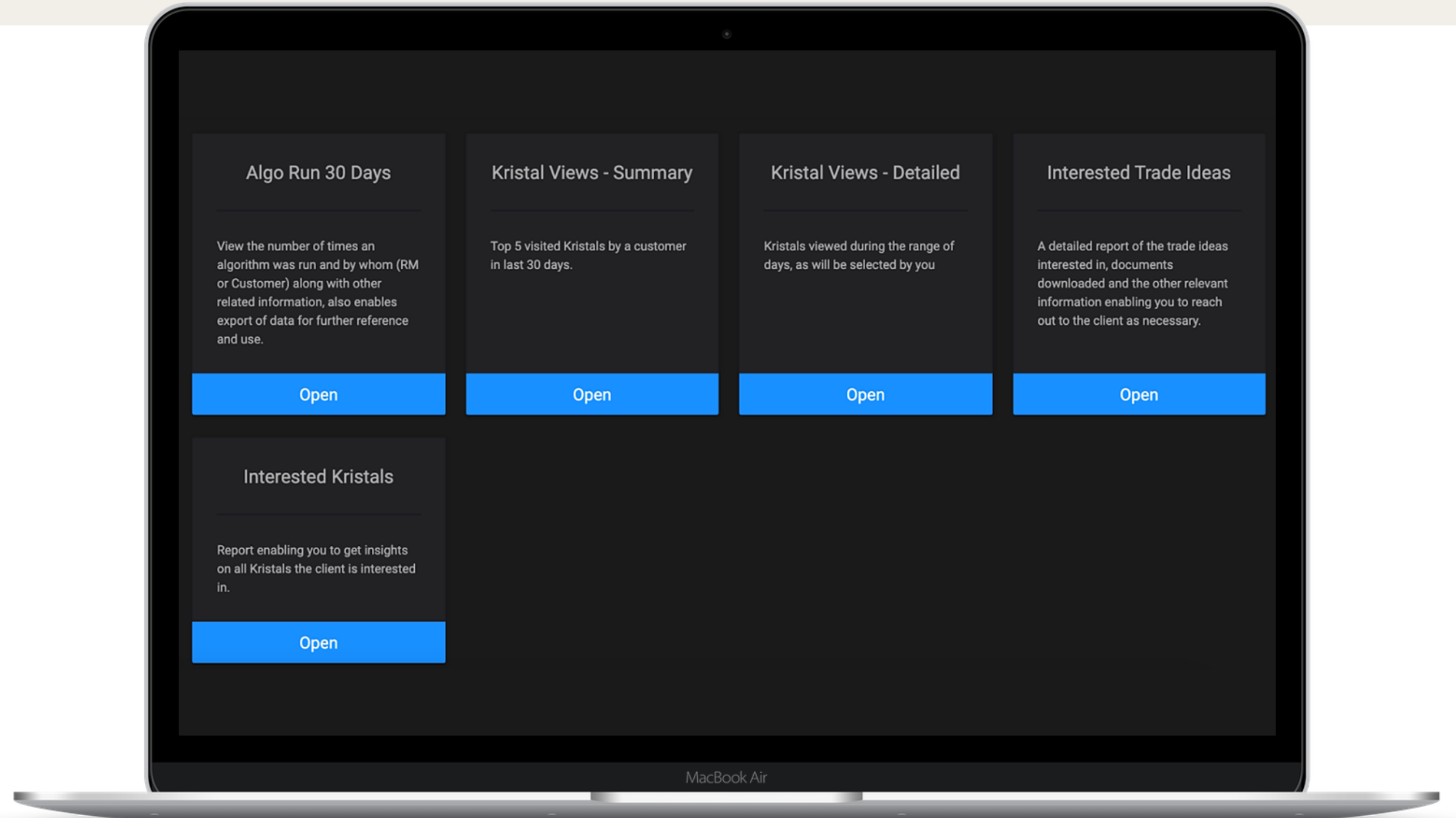
Portfolio Risk
Assessment for you



User activity history



Summary View to get a
bird's eye picture

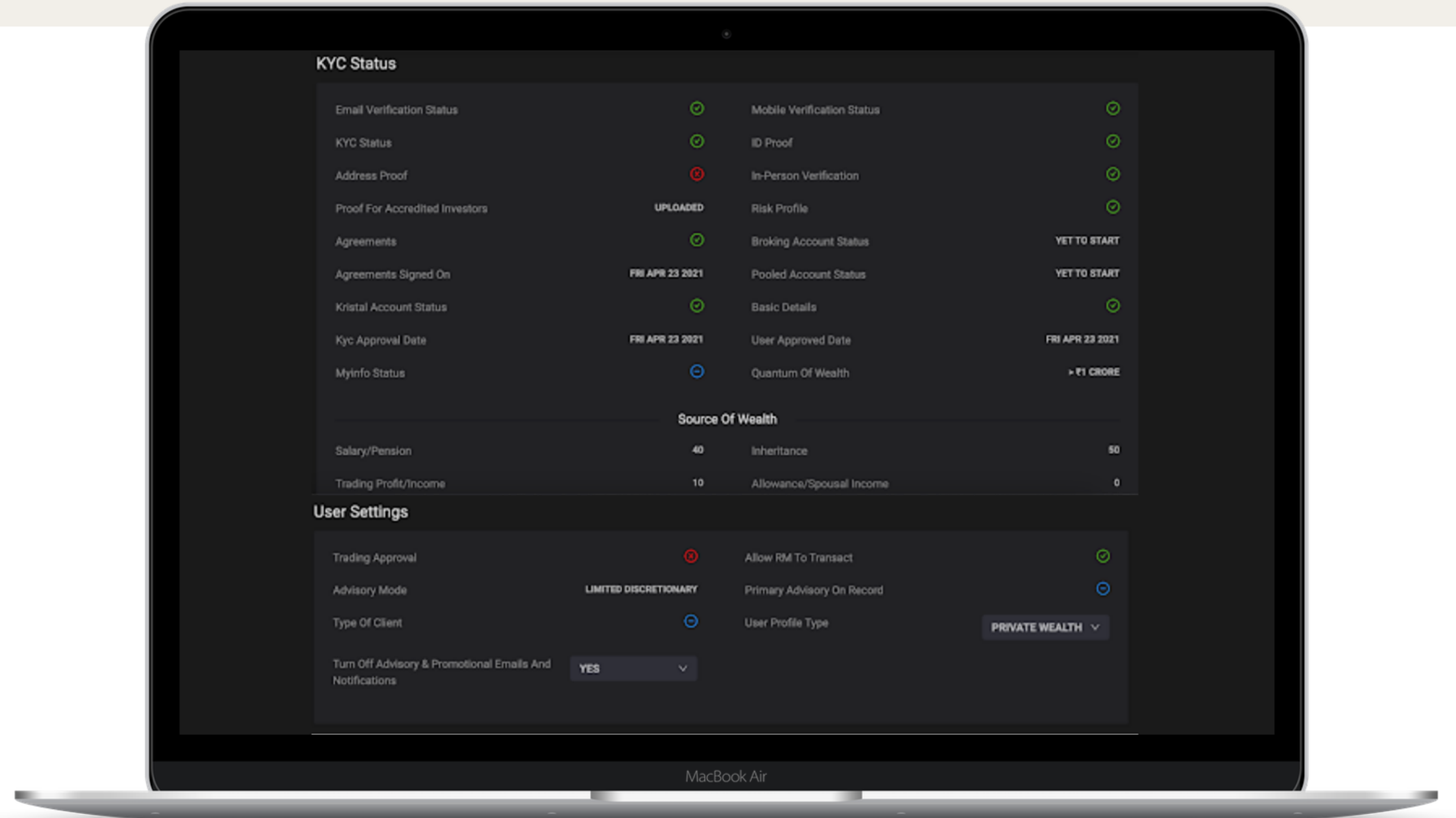


Client View

Client management has never been easier!



All Client KYC status & details in one place



Client View

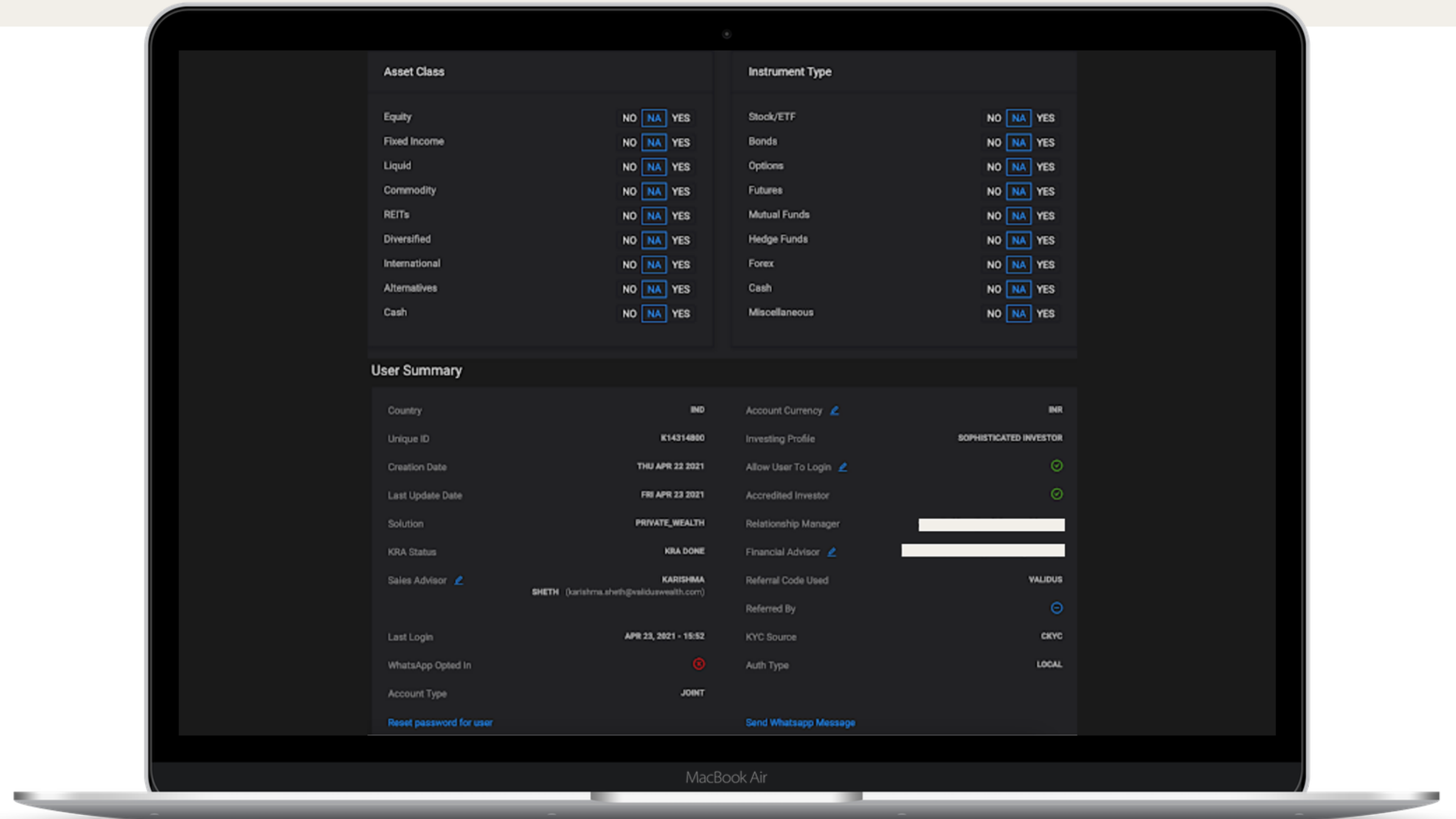
Client management has never been easier!



Save Client Preferences
across asset classes



User Summary to
manage client journey



Client Portfolio

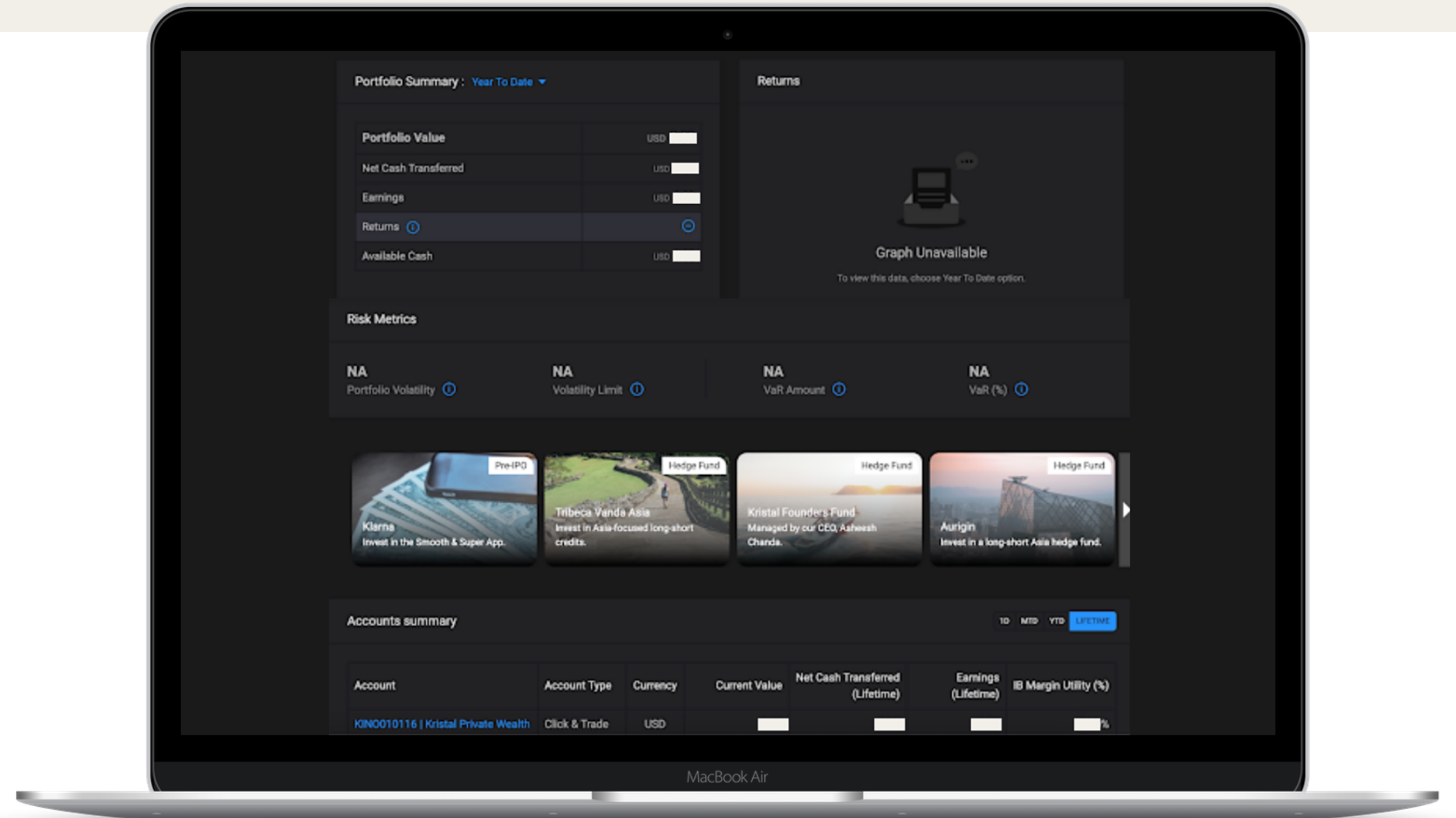
Client Portfolio Information at your fingertips



All Client Accounts at one place



Consolidated view of portfolio value

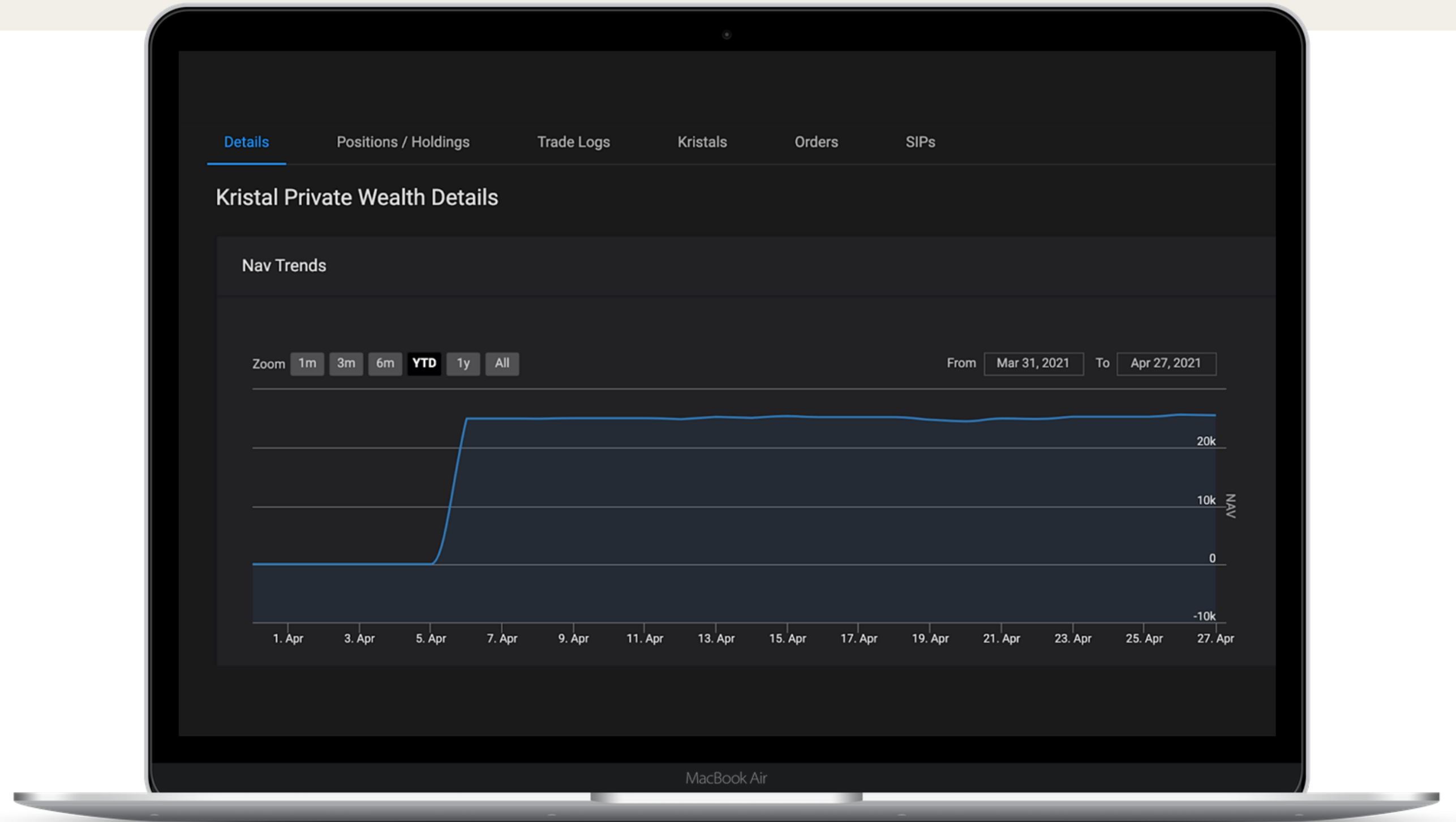


Client Portfolio

Track clients' portfolio (transactions & performance)



Visually understand
client goals with Rich
Charts



Manage the investment journey



Run Advisory Algo



Generate Reports



Risk Analysis



Bookmark Kristals



Facilitate client transactions



Access management



**Join the movement to make wealth management
global, personalised, and hassle-free.**

 **KRISTAL**

Commercial Terms & Asset Specific Risk

INSTRUMENT TYPE/CLASS	RISK LEVEL
For Retail Investors:	
Treasury bonds / Money market bonds / High grade Government Bond ETF	
Corporate bonds (Investment grade) ETFs	Low
High yield bonds ETFs / Gold ETF / REITS ETF / Developed Market Equity broad Index ETF	
Developed Mkt Mld & Small Cap Equities ETF / Subordinated Bond ETFs / Silver & Broad Commodity ETF / Single Name IG Corporate Bonds	Medium
Direct Equities Large cap (More than USD 5B market cap) / Emerging market ETFs (Bond & Equity) / Single commodity ETF	
For Accredited Investors:	High
Inverse & Leveraged ETFs / Small-Mid Cap equities (Less than USD 5B market cap) / Single name Sub-IG bonds / Unleveraged ELON with underlying of SL 3 and below	
(long only via options) (Bull Call Spreads / Bear Put Spreads / Long Butterfly Call or Put Strategies)/ Covered Call Strategies / Long-Short Hedgefund arbitrage strategies (e.g. Ariana, Aurigin)/ AT1 Bonds/ CoCo Bonds	
Long Short Equities BG Long Short / Private Equity and VC like Investments	
Strategies that include Index Options (includes selling) Index Technical Trader	Very High
Strategies that include Single Stock Options (includes selling) / Leveraged Pooled Strategies (Kristal Founders Fund (Carry++) / ELONs on Underlying SL 3 and above and with embedded leverage	

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