

### Client:

- ↳ A leading company in India for wealth management, capital markets and advisories

### Business Challenges :

- ↳ Converting the complete IPO process from manual process into an automated process
- ↳ BRML report to match with the exchange data
- ↳ Providing ASBA feature for individual transaction

### Business Values :

- ↳ Automated comprehensive solution
- ↳ Real-time processing system
- ↳ Client level consolidated data across exchange/depository
- ↳ Client data captured at branch level

### Client Profile

A premier financial services organization providing individuals and corporate with comprehensive financial solution, the company offers multiple products and services in the secondary markets that include Equity and Derivatives.

### Situation

Client had been communicating to their clients manually, which was a very difficult process and that had to be automated which was made mandate by regulatory bodies. The client faced a problem in tracking delivery of a few reports and they only had a manual delivery channel.

### Decision to go with KGfSL's e-Attest:

After KGfSL's solution the firm decided to go ahead with KGfSL's e-Attest.

The Core Differentiators in favor of e-Attest were:

- ➔ Multiple document could be zipped and sent
- ➔ Conversion of HTML document to PDF
- ➔ MIS report generation and delivery tracking
- ➔ Bulk re-sending and reversal handling
- ➔ Delivery channels such as Mail, web services & SFTP
- ➔ Exhaustive after-sales support extended to the client whenever needed

### Implementation & Success

The project team made up of key stakeholders was formed to customize the application so that it could support them in their day-to-day business. Considerable time and attention was given to gaining an understanding of exact business needs and process required by the users of the Digital Signature & other features of e-Attest.

The automated process helped the client send reports through digital signature which is very secure. The MIS report generation process helped the client in monitoring. This helped the client fulfill the regulatory body's mandatory process. Multi threaded application is used as huge volume of transactions are recorded.