



# PLATFORM DELIVERABLES

2024

CORE  
ALLOCATION  
DELIVERABLES

MASTER  
SUMMARY  
WORKBOOK

MARINA

SATELLITE  
ALLOCATION  
WORKBOOK

OUR  
DELIVERY  
PROCESS



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# Core Allocation Deliverables

One can take informed decisions for Fresh purchases, Regular Income or Existing asset rebalancing :

## Our Platform Key Utility

Provide Data - Science based framework and system which gives assessment on:

- Asset Class Selection ( Equity : Debt ; Equity : Debt : Gold )
- Broader Category Selection Within each Asset class
- Sub-Category Selection

## Covers Diverse Investor Profile : For Lumsum

No Profile

Aggresive

Moderate

Conservative

## Covers Diverse Investor Profile : For Regular Income

Moderate

Conservative



## Flexibility to Choose frequency of Re-balancing

Minimalistic	Limited	Active
5-7 times in entire investment journey say 15 year	10-12 times in entire investment journey say 15 year	18+ times in entire investment journey say 15 year

### Cover Diverse Investor Profile for SIP :

- 3 Year + : Short to Medium term
- 7 Year + : Medium to Long term
- 12 Year + : Long term

### Cover Specific Guidance :

When to go For Lumsum ? In which Category & Sub-category ?

When To Start STP and When To Stop STP + Switch fully

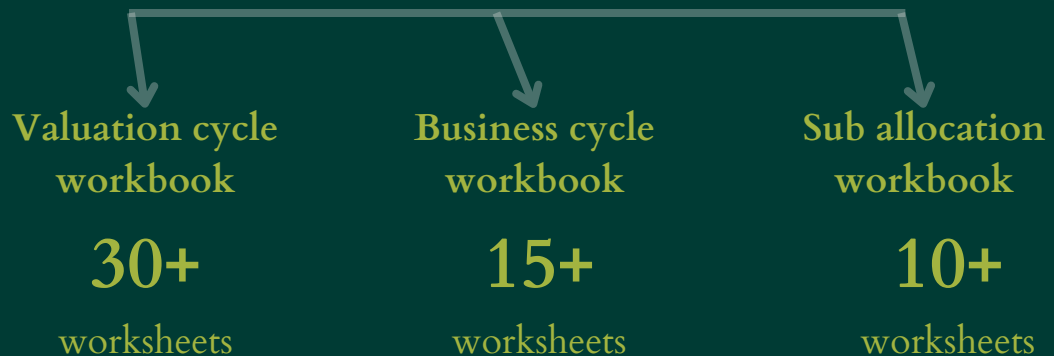
### How do we do it?

We strongly believe that studying Band theory of Valuation made based on Past data does not work.

We Provide Data-Science based Framework and Algorithm which study Valuation + Business cycle and help us to assess “Where are We standing” in the cycle with the below mentioned methodology.



## Core Allocation Dashboards



Each workbook is divided into 3 sections :

### Section 1



Input , Scores & Analytics : Green Colour section of Main panel

#### Time – tested metrics : Input

- One – stop centralized platform for 20 + Important Metrics spanning across 3 algo workbooks. Historical data ranging from 23 to 28 year.

#### Scores : Derived Values of above Input

- Algo-based system decode above metrics into common language ( Scores ) so that even a layman can understand. Score of the same stats of the same metrics can be different across time-frame.

#### Analytics :

Action Zone based on score.



## Section 2



### Detailed Study : Orange colour section of Main panel

A detailed study on specific action has been transparently disclosed across market phases with back-tested results. One will have complete picture on underlying rationale for action and clarity on understanding the outcome.

## Section 3



### Summary : Blue colour section

We provide a Unified score at Summary section in the name of Distilled Score. Ready reckoner provided for Advisor looking for limited action or Less rebalancing.

Specific ratio for capital allocation shared across cycles or Zone.

User can navigate according to desired month and year for quick access to current and historical action plan.





**Master Summary Algo Workbook including Fund Filtration:** It's a **Automated workbook** which shows calculation of all 55 + worksheet in a **Single dashboard**.

Say good - bye to educated guesses and Gut/Narrative based decision and **take Framework oriented : Guidance & System Driven : Action.**

We also provide tool for Advisor Seeking a **Second Opinion on Fund Filtration** across category.

**Fund filtration is NOT OUR primary expertise.** This is additional handholding service.

## **Pricing & Plan**

Core Allocation Dashboards + Master Summary  
Workbook : 36,000 Including GST for 36 Month

## **MARINA – Machine Assisted Risk and return integrated Navigation Algorithm**

India's first tool for Style section

### **Key Utility :**

- Assisting MFD/RIA to select AMC based on Favorable Style.
- Helping MFD/RIA build own portfolio around Style/Factors through Passive funds.

**How We Do It ?**  
**Through MARINA WORKBOOK**





We provide, Machine assisted Underlying scores which helps in Style identification and Rotation based on Current scores.

One can see the summary of action across cycle/zone.

One can select Year, for detailed return and drawdown analysis based on action taken.

One will have access to detailed Fund quants based on STYLE , GLOBAL & DOMESTIC THEMATIC. Asset allocation pattern for hybrid funds across time frame is provided for detailed analysis.

## Pricing & Plan

Core Allocation Dashboards + Master Summary  
Workbook + MARINA : 48,000 Including GST for 36  
Month

## Satellite Workbook for Tactical allocation : Global & Domestic thematic

**How we do it ?**  
**Through Global and Domestic Thematic Workbook**

We provide analytics specifically for US valuations to our users. For other markets, we internally monitor them using standard valuation measures. When those markets enter an affordable range, we generate buy calls supported by clear reasoning.



We internally assess sector valuations and alert users when there's a favorable margin of safety. We totally follow counter-cyclical approach. 1 to 10 sector ranking is provided in Summary section.

## Pricing & Plan

Core Allocation Dashboards + Master Summary  
Workbook + MARINA + Satellite Allocation  
Workbook : 56,000 Including GST for 36 Month

Core Allocation Dashboards			
Master Summary Workbook			
MARINA			
Satellite Allocation Workbook			
Pricing (for 36 months)	36,000 (Incl. GST)	48,000 (Incl. GST)	56,000 (Incl. GST)





# Our Delivery Process

**Cloud based platform :** Exporting all the data and analytics into MS Excel format with graphical visualization, which is widely used among the fraternity.

To enhance user experience, the Navigation panel on the Home page is given with the description and functionality of each Worksheet.

Ready reckoners and User manuals are provided for smooth navigation, utilizing the platform, and harnessing the features effectively.

**Important Note :** Our cloud based platform will be updated on a Fortnightly & Monthly basis.

Elevate your advisory framework with our Un-biased algorithmic solution :

1. **Time Saving :** By reducing your reliance on seeking opinion and narrative based decision. Spend less time searching + strategizing and Spend more time on Profiling + execution.



**2.Unbeatable Rebalancing** : Our system is your ultimate partner in asset rebalancing. Hence additional incremental asset, for those who understand that system and process scores over narrative/educated guesses/Gut based decision in long run.

3.Thirdly, managing large sums of money can be daunting, but not with us. Our rule-based framework empowers you with the confidence to handle substantial investments.

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