



KRISTAL.AI

INSPIRATION : YOU

KRISTAL's Enterprise Solution

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

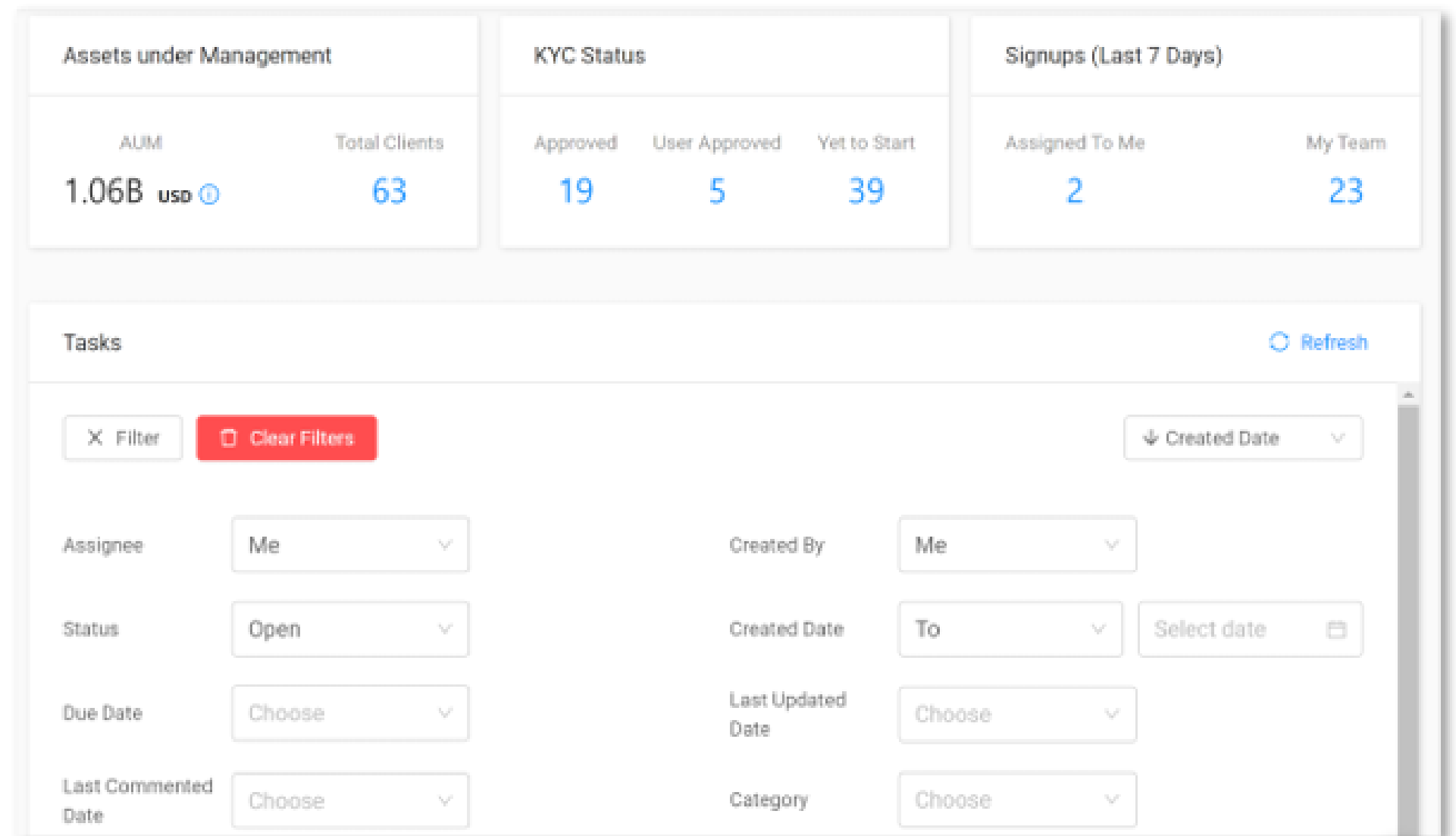
Interactive Dashboard

Seamless **Onboarding** and **KYC**

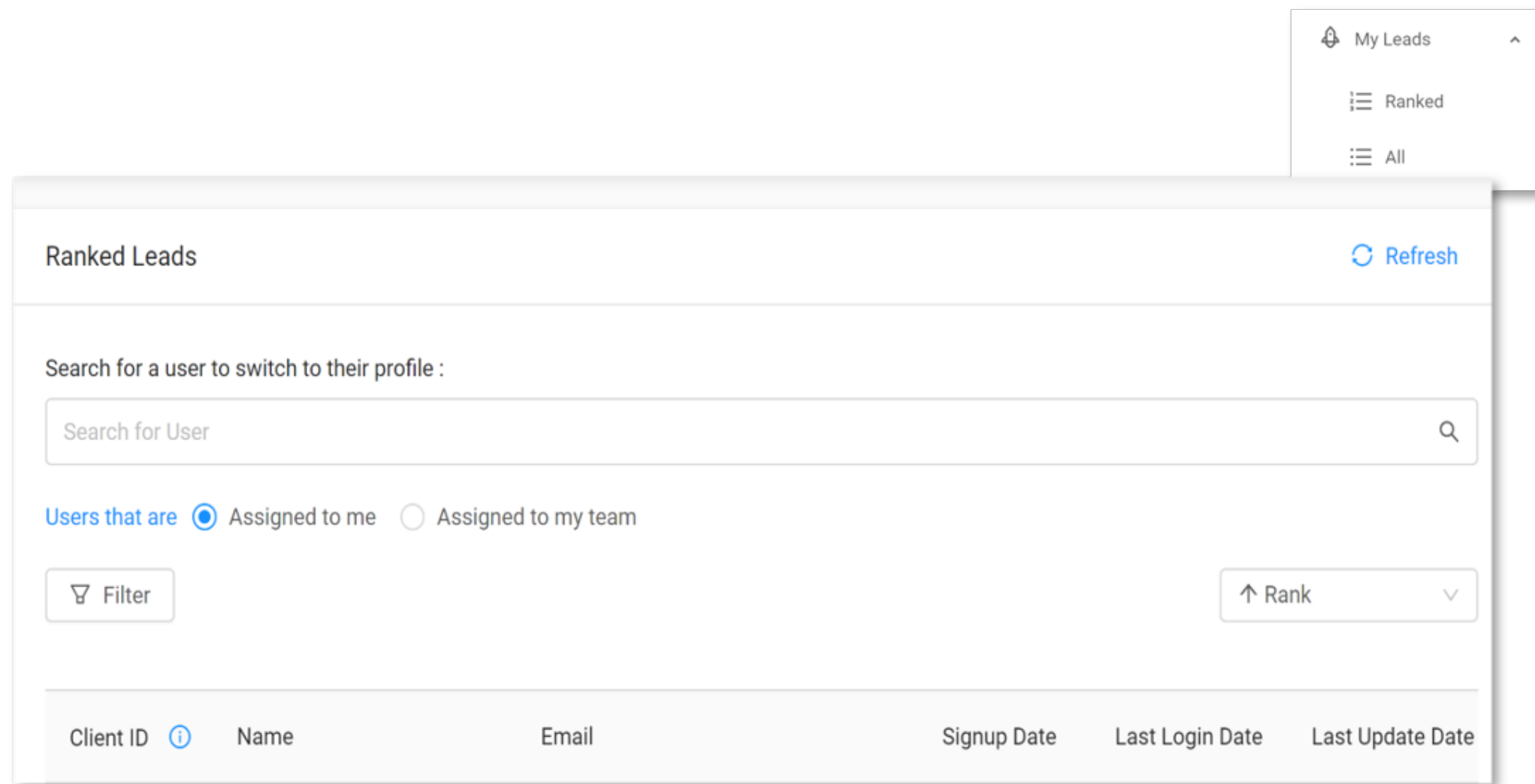
Favourite users

Track all the **Aggregates** at
one place

Generate **Tasks** and follow up
with advanced filters



Leads Page



Track **Leads** and **KYC status**

Assign **Ranks** to leads

Detailed **Client Information**
and login status

Switch to **Client Profile** right
from the app

Customers Page

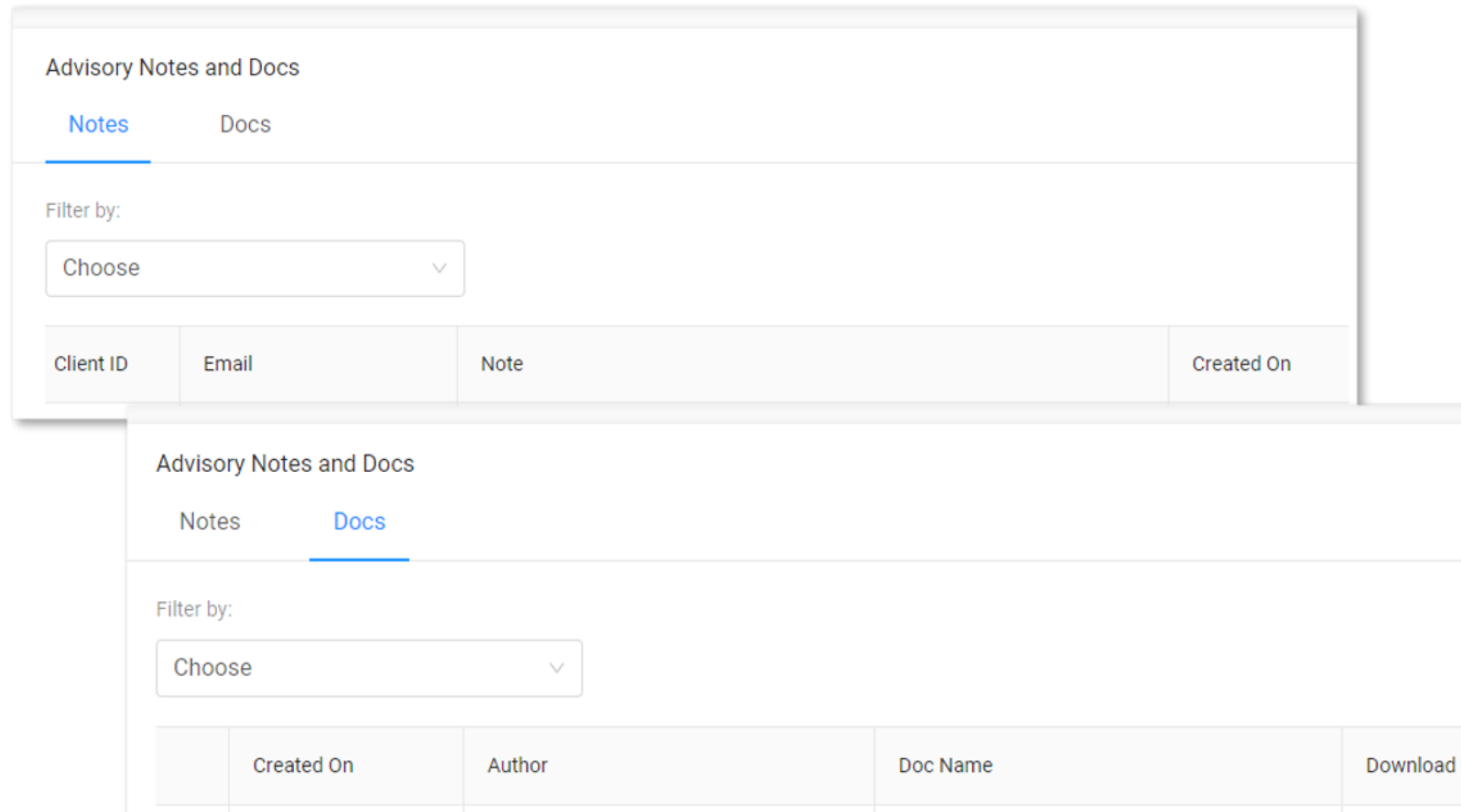
List of **Clients** in one place

Advanced **Search** for users

Track **Client Actions** like AUM
and Last Funding date

The screenshot displays the 'Customers Page' interface. At the top right, there is a dropdown menu with three options: 'My Customers' (selected), 'Ranked', and 'All'. Below this, the main content area is titled 'Ranked Customers' and includes a 'Refresh' button. A search bar is present with the placeholder text 'Search for a user to switch to their profile :'. Below the search bar, there are radio buttons for 'Assigned to me' (selected) and 'Assigned to my team'. A 'Filter' button is located on the left, and a 'Rank' dropdown menu is on the right. The table below has the following columns: Client ID, Name, Cash Transfer AUM, AUM, Last Funding Date, Last Subscription Date, and Last Algo Run Date.

Notes and Docs



Create **Client Notes** on
the go

All **Client Documents** at
one place

Access all **Notes &
Documents** in a few clicks

Communication Hub

Client Communication made easy

No more searching emails and
text messages

Reach out to clients with **Rich
Format Emails** & texts

The screenshot shows a web interface for sending bulk messages. At the top, there are two tabs: 'Send Bulk Message' (active) and 'History'. Below the tabs is a section titled 'Bulk Messages'. The form includes the following fields and options:

- Message Title :** A text input field with the placeholder text 'Message Title'.
- App Notification Text :** A larger text area with the placeholder text 'App Notification Text'.
- Message Body :** A section with two radio buttons: 'Rich Text' (selected) and 'HTML'.
- Two icons with labels: 'Pop out' (represented by a double arrow icon) and 'Preview' (represented by a camera icon).
- A text input field at the bottom labeled 'Message Body'.

Analytics that assist you

Advisors		User Activity	
User Portfolio Risk Metrics	>	Algo Run 30 Days	>
User Account Risk Metrics	>	Kristal Views - Summary	>
Kristal Risk Metrics	>	Kristal Views - Detailed	>
Kristal Metadata	>		

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 KYC status & details

Save **Client Preferences**
across asset classes

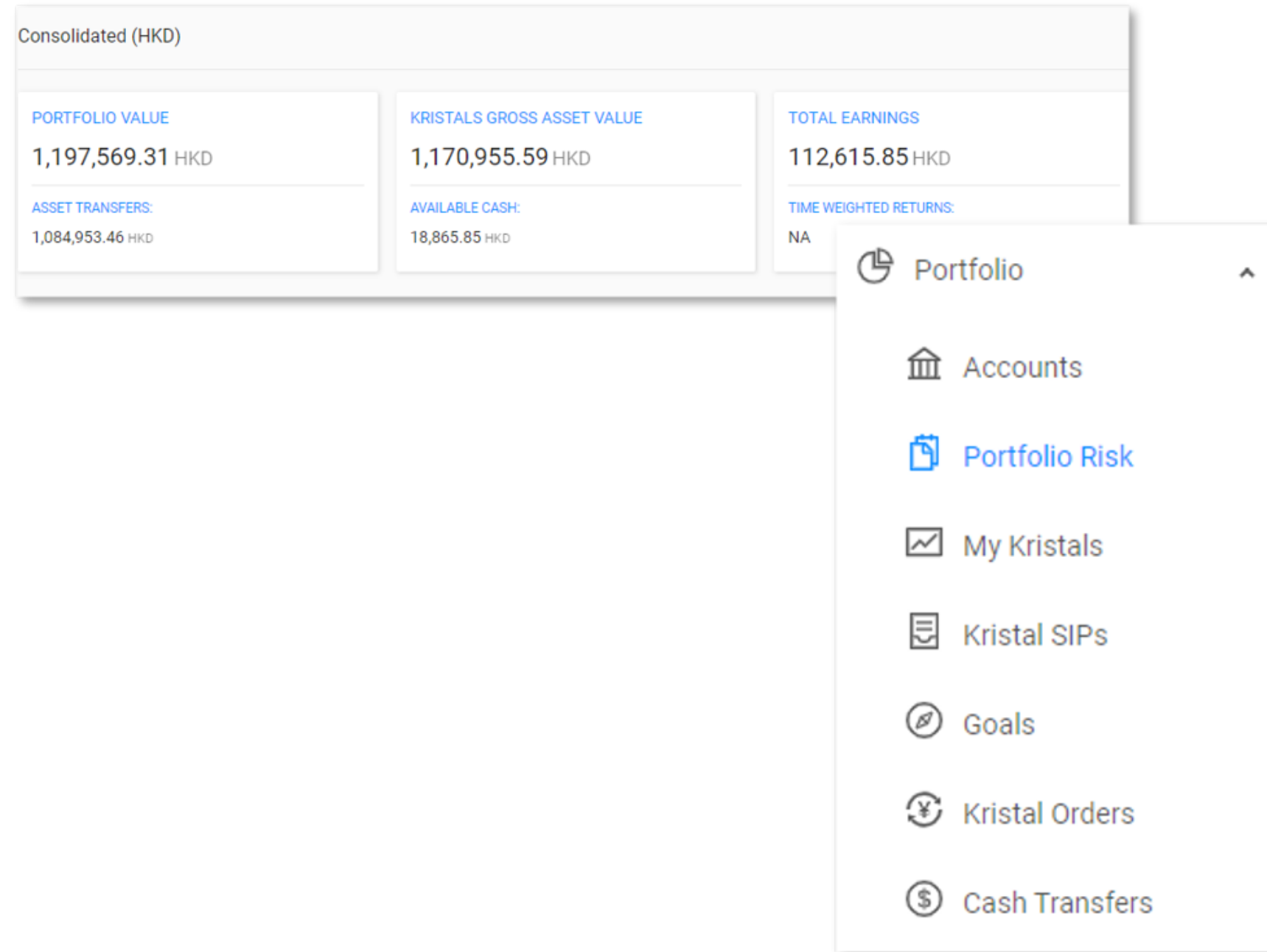
User Summary to manage
client journey

The screenshot displays three overlapping panels from a client management interface:

- User Summary:** A list of fields including Country, Account Currency, Unique ID, Sophistication Level, Creation Date, Allow User To Login, Last Update Date, Accredited Investor, Solution, Relationship Manager, KRA Status, Financial Advisor, and Sales Advisor. Several fields have a blue edit icon.
- KYC Status:** A list of verification and status fields including Email Verification Status, Mobile Verification Status, KYC Status, ID Proof, Address Proof, In-Person Verification, AI Declaration, Risk Profile, Agreements, Broking Account Status, Pooled Account Status, Freedom Account Status, and Basic Details.
- User Preference:** A section titled "Asset Class" with a table of preferences for various asset types. Each row has three radio buttons labeled NO, NA, and YES.

Asset Class	NO	NA	YES
Equity	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Fixed Income	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Liquid	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Commodity	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
REITs	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Diversified	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
International	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Alternatives	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Cash	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Client Portfolio



Manage **Client Portfolio** &
risk

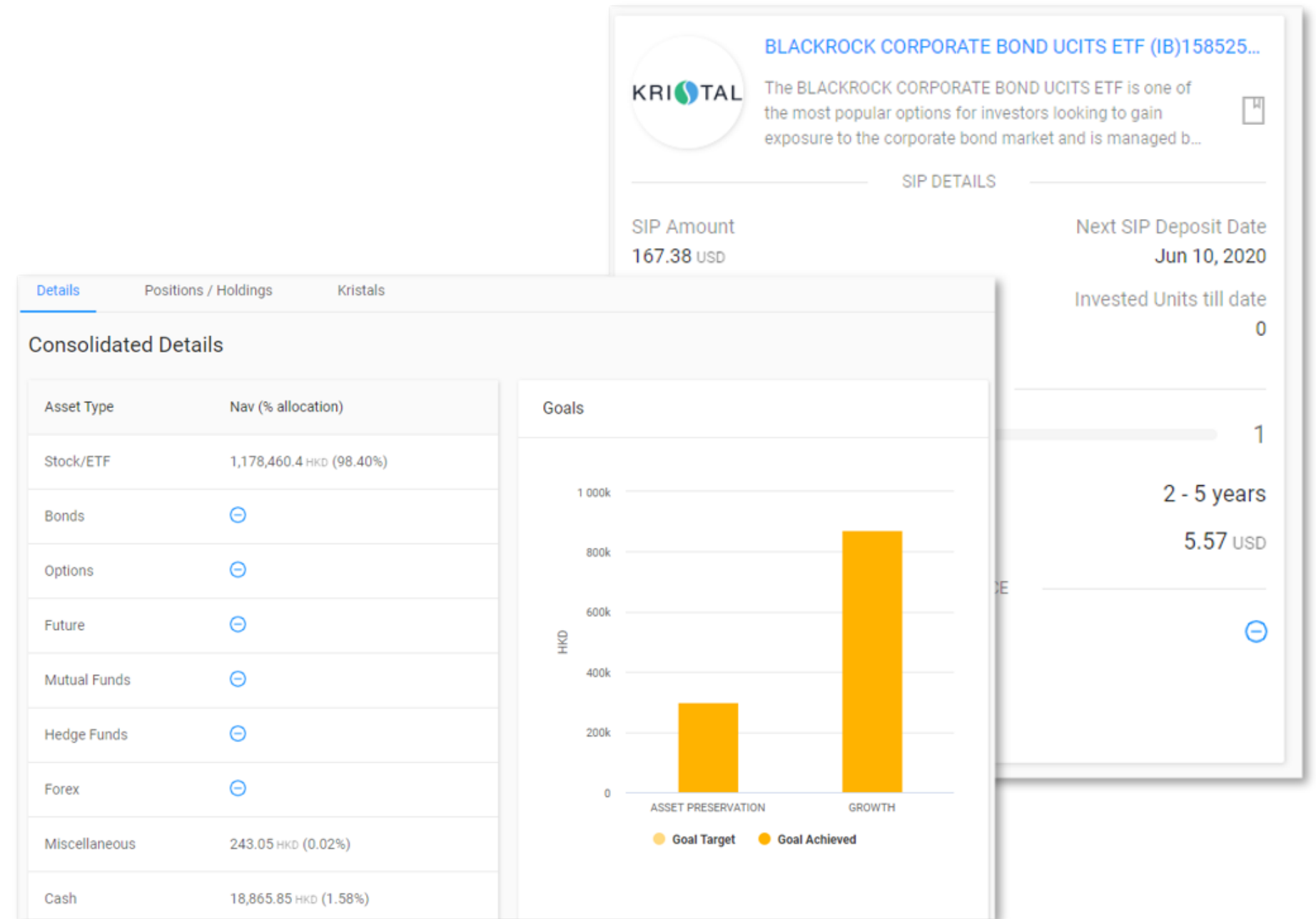
All **Client Accounts** at one
place

Consolidated view of
portfolio value

Client Portfolio

Track **Client SIPs** and investments

Visually understand client goals with **Rich Charts**



Placing client orders

On behalf of your clients you can -

Run Advisory Algo



Bookmark Kristals




Place Orders/SIPs



Generate Reports



and a lot more...



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

KRISTAL.AI



Thank You

Kristal.AI | hello@kristal.ai

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