JK LAKSHMIPAT UNIVERSITY
Institute of Design
NAAC 'A' Grade Accredited

Designing the All-in-one platform for Financial Distributors

Vol. 1 of 2

Student: **Shamyuktha San**

Sponsor: **HumanX**

Mentor: **Raj Menon**

Consultant: **Sonia Bhikru**

Programme:
Bachelor of Design(B.Des)
Interaction Design

THE GRADUATION PROJECT 2024

The Evaluation Jury has recommended **Shamyuktha San**

For graduation from **Institute of Design, JK Laksmipat University**

with specialization in **Interaction Design**

Herewith, for the project titled **"Designing the All-in-one platform for Financial Distributors"** on fulfillment of requirements by

Jury Chairman _____ _____

Jury Member _____ _____

Jury Member _____ _____

Subsequent remarks regarding fulfillment of requirements

_____

_____

_____

_____

_____

Dean, Institute of Design
JK Lakshmipat University

Originality Statement

I hereby declare the work submitted here is entirely my own and does not contain any substantial portions or complete copies previously published material. It also does not include significant portions of material that have been accepted for the completion of another degree or final graduation from any other educational institution, unless proper acknowledgement has been provided in this Graduation project. Additionally, I affirm that I have not borrowed or copied any concepts without giving appropriate credit. The intellectual content of this Graduation Project is solely the result of my own efforts, except for any assistance received from others in the project's design, conception, style, presentation and linguistic expression, which have been duly acknowledged. Finally, I assert that this Graduation Project, or any part of it, has not been and will not be submitted as assessed work for any other academic course.

Student Name in Full: _____

Signature: _____

Date: _____

Place: _____

Copyright Statement

I hereby authorize the Institute of Design, JK Lakshmipat University to archive and provide access to my Graduation Project, either in its entirety or partially, within the Institute for academic purposes. This permission applies to all significant portions of copyrighted material have been used in my document, or I have obtained the necessary permissions to utilize such material.

Student Name in Full: _____

Signature: _____

Date: _____

NDA

Each of the parties shall not disclose to any person any information, whether in written or any other form, disclosed by or on behalf of one party(“Disclosing party”) to the other party(“Receiving party”) in the course of discussions leading up to or the entering into or during the performance of this Agreement and which is identified as confidential or is clearly by its nature confidential including, but not limited to, the works provided by You under this Agreement as well as any other information internal to Company or any Company affiliate(“Confidential Information”) except insofar as: (a) is required by a person employed or engaged by the Receiving Party in connection with the proper performance of this Agreement (but only to the extent that any person to whom the information is disclosed needs to know the same for the performance of their duties and provided the Receiving Party shall be obliged to procure that all such persons are aware of the obligation of confidentiality and undertake to comply with it); or (b) is required to be disclosed by the law (provided that the party disclosing the information shall notify the other party of the information to be disclosed and of the circumstances in which the disclosure is alleged to be required as early as reasonably possible before such disclosure shall be made and takes all reasonable action to avoid and limit such disclosure).

Acknowledgement

I would like to express my deepest gratitude to all those who have provided me with the possibility to complete this project. First and foremost, I am profoundly grateful to my mentor, Mr. Raj Gopal Menon, for their invaluable guidance, continuous support, and patience throughout the course of this project. Their immense knowledge and plentiful experience have encouraged me in all the time of my academic research and daily life. I am grateful to Prof. A. Balasubramaniam, the founding Director of the Institute of Design at JKLU, for forming a dedicated team of faculty members who provide unwavering support and have exceptional expertise in their respective domains. His invaluable contributions have played a crucial role in establishing and nurturing this institute. I would also like to thank Dr. Devanuj Balkrishan and Karthikeyan P, who have provided me with insightful comments and suggestions. Their constructive feedback was instrumental in shaping this project. I would also like to extend my sincere appreciation to my industry mentor, Varun Murkar and Sonia Bhikru, for their domain expertise, and practical inputs that have enriched the project. Their professional guidance and mentorship have been instrumental in aligning my project with real-world requirements. Furthermore, I would like to thank the faculty and staff at JK Lakshmipat University, Jaipur, for providing me with the necessary resources, facilities, and academic support. Last, but not least, I am deeply thankful to my family, friends, and loved ones for their support, encouragement, and motivation throughout this journey. I would also like to extend my sincere appreciation to anyone whom I might have unintentionally missed out on acknowledging. I have made every effort to acknowledge all individuals who have contributed to my graduation project, and I am grateful for their support, guidance and contributions.

Contents

Originality and Copyright Statement 05
NDA 07
Acknowledgement 09
Contents 10

Introduction 11

JK Lakshmipat University 11
Interaction Design 12
HumanX 13
CompoundExpress 14

Research 16

Benchmarking 17
Video Reference 28
Primary Research 29
The 4 Voices 30
User Persona 37
Design Principles 39
How Might We 41
Stakeholders 45
The product: compoundexpress 46

Design System 48

Colours 49
Text Style 57
Buttons & Links 61
Controls 64
Input Fields 65
Navigation System 73
Icons 81
Alerts 82
Logo 84

User Flow 86

New Purchase 87
STP & Switch 91
Onboarding 95



JK Laksmipat University

Established in 2011, JKLU is inspired by the futuristic vision of Lala Lakshmipat Singhania, the key founder of Lakshmipat Singhania Education Foundation. Under the aegis of J.K.Organisation, the Foundation has been extending its legacy and vision of 'Education to all' for decades.
Institute of Design at JKLU aims to shift from conventional design education towards a more future-ready and transformative way of learning to enable students to become successful designers.

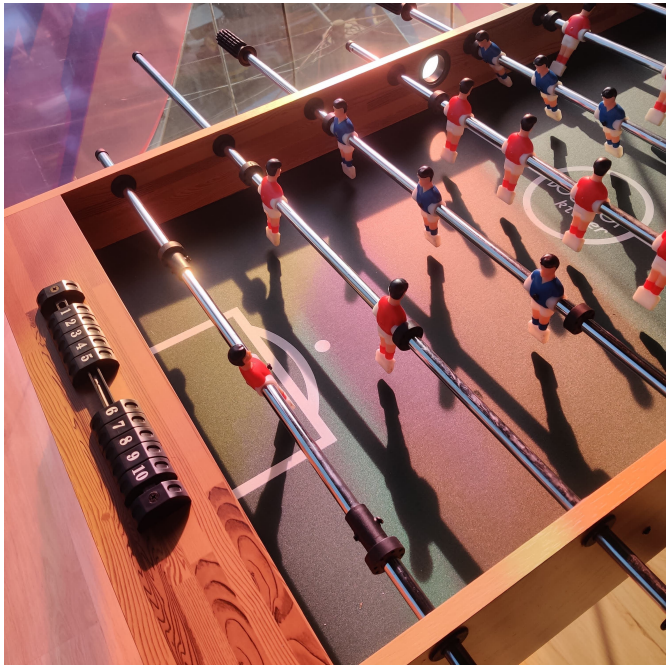


Interaction Design

The Interaction Design program at JKLU is tailored for tech-savvy young audiences comfortable in both virtual and real worlds. It combines cognitive and computer sciences to help students create engaging analog and digital experiences. Courses cover cognitive ergonomics, user research, prototyping, information architecture, and inclusive design, teaching students about human behaviour. Visual skills are honed through typography, UI design, and data visualisation classes. Technical proficiency is developed with HTML/CSS, Android programming, AI, and AR/VR. Students also work on real-life projects like app design, web design, IoT, and human-machine interfaces.

HumanX

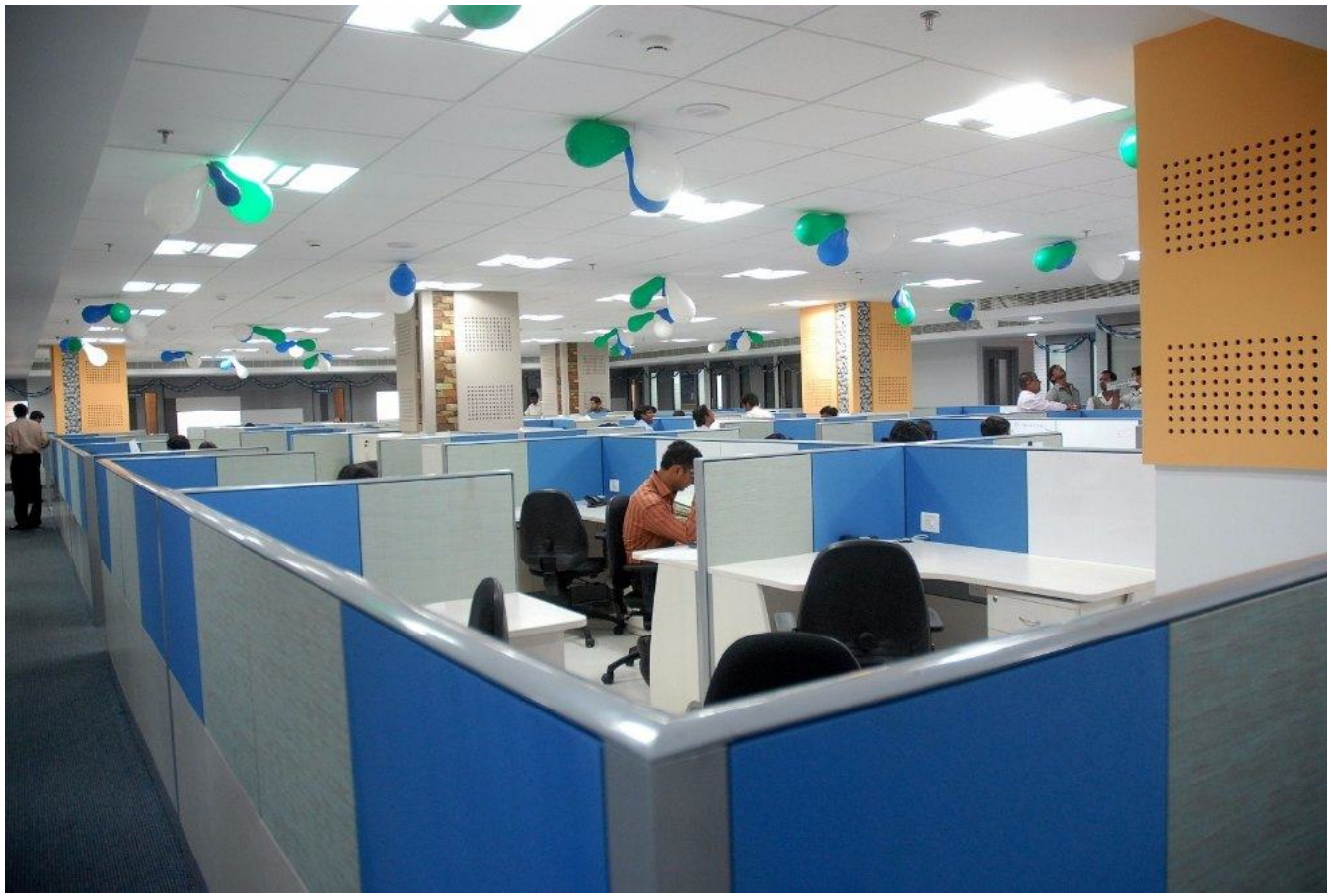






HumanX is a Customer Experience(CX) Design and Tech consulting studio that shapes digital experiences with a human edge. We partner global CXOs who seek to build best-in-class experiences that lead to business & behaviour outcomes.

compoundexpress



CompoundExpress is a faction of the finance company called DSP Mutual Funds. They wanted an enterprise software for financial distributors to make the whole process easier and faster.

Research

UX design research is the foundation for understanding your users. Through methods like interviews, surveys, and testing, it gathers data on user needs, behaviours, and goals. This information paints a clear picture of how users interact with similar products and the challenges they face. By analyzing this data, UX designers gain valuable insights that guide every design decision, creating a product that truly caters to user needs.

Secondary research

Secondary research involves the summary, collation, and synthesis of existing research rather than conducting new primary research. It uses data that has already been collected by others, such as reports, studies, and statistical analyses, to gather insights and information.

Benchmarking

DIRECT BENCHMARKS

FintsoWM Centricity MProfit

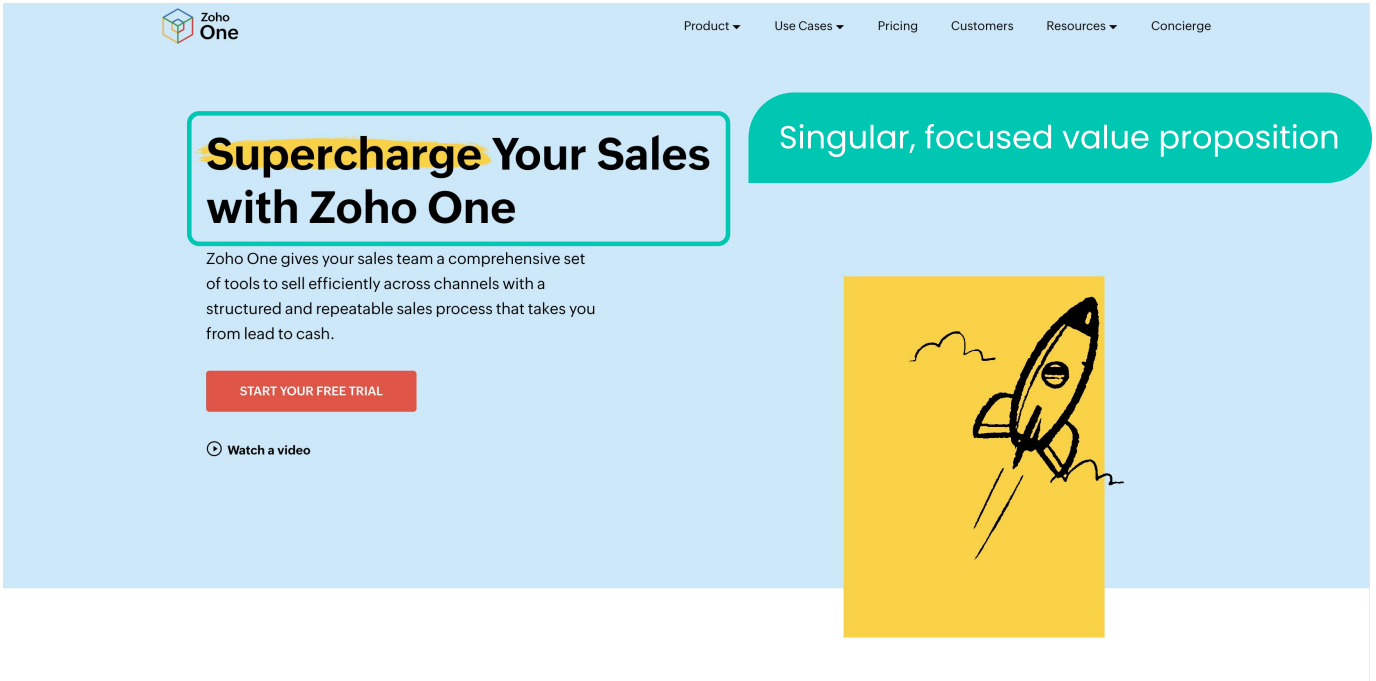
INDIRECT BENCHMARKS

Paytm Money Betterment smallcase Wealthfront

CROSS-CATEGORY

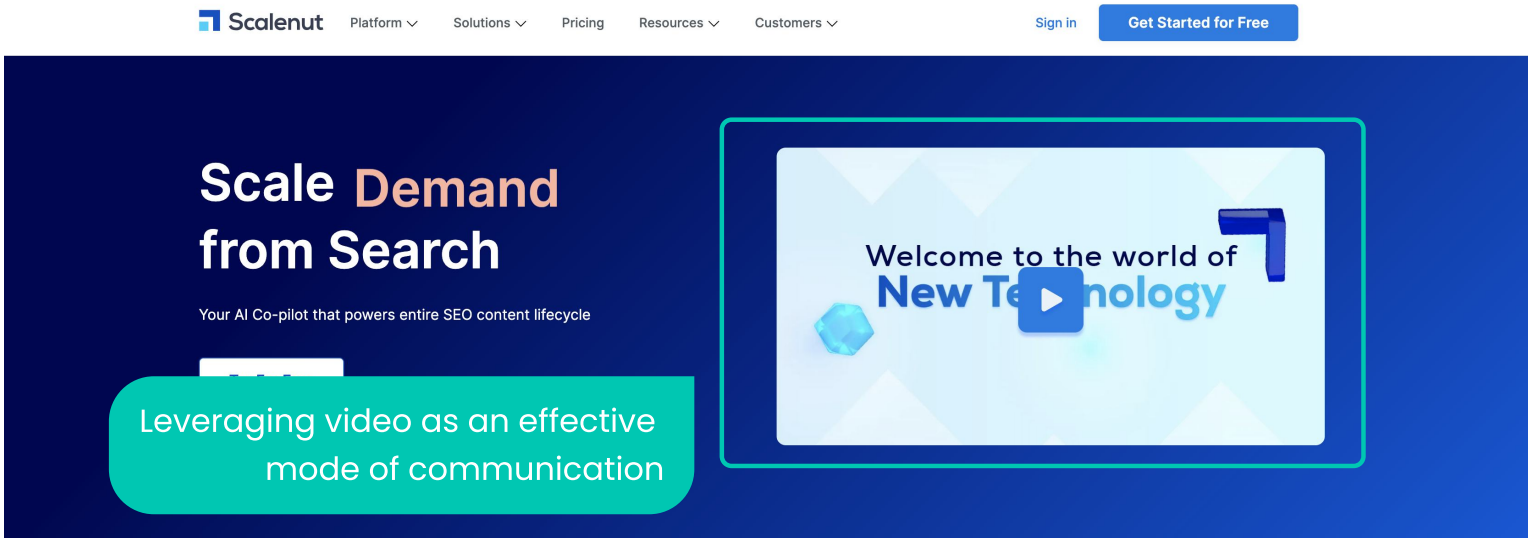
ZOHO Product School Syllabus deel.

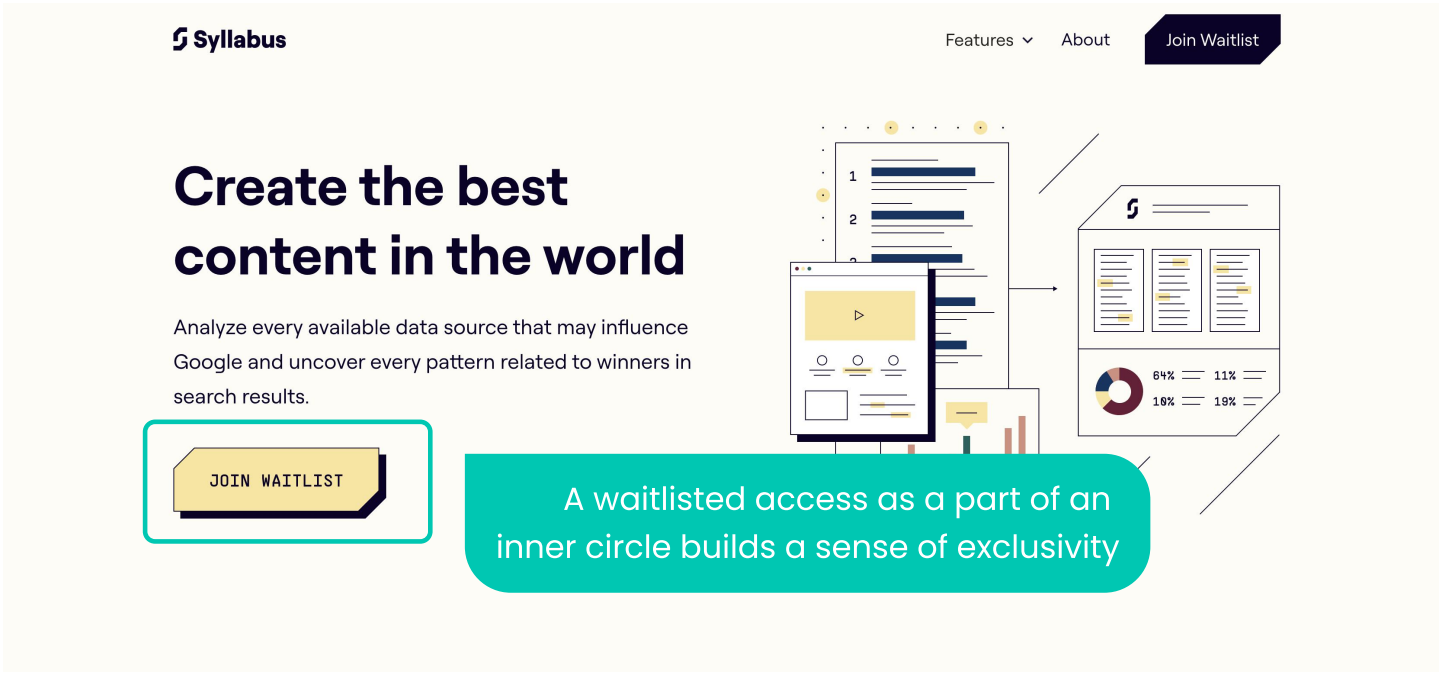
Scalenut GitLab



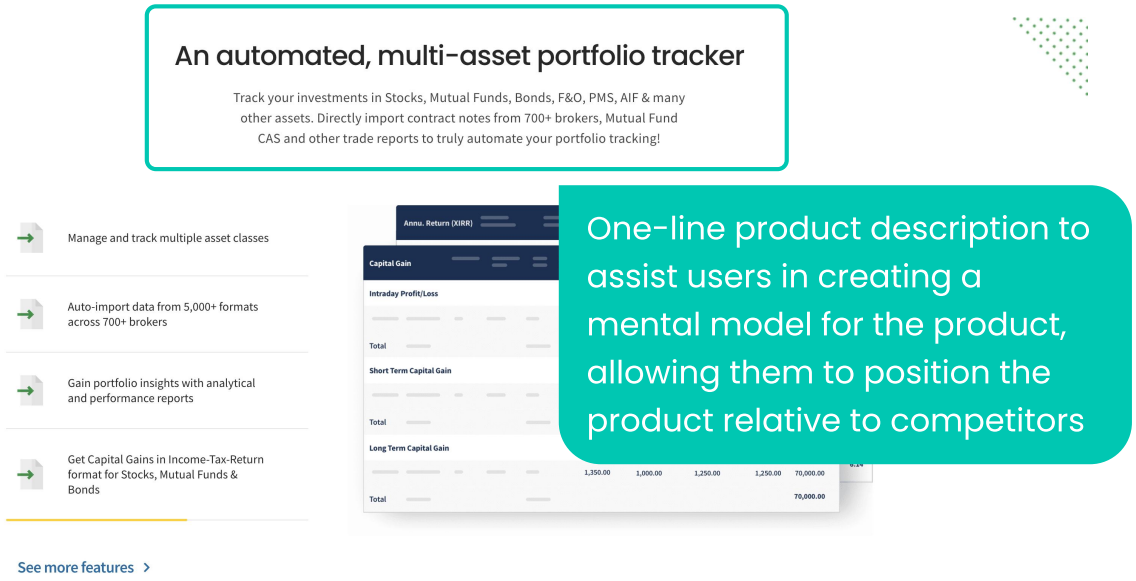
ZOHO

Scalenut

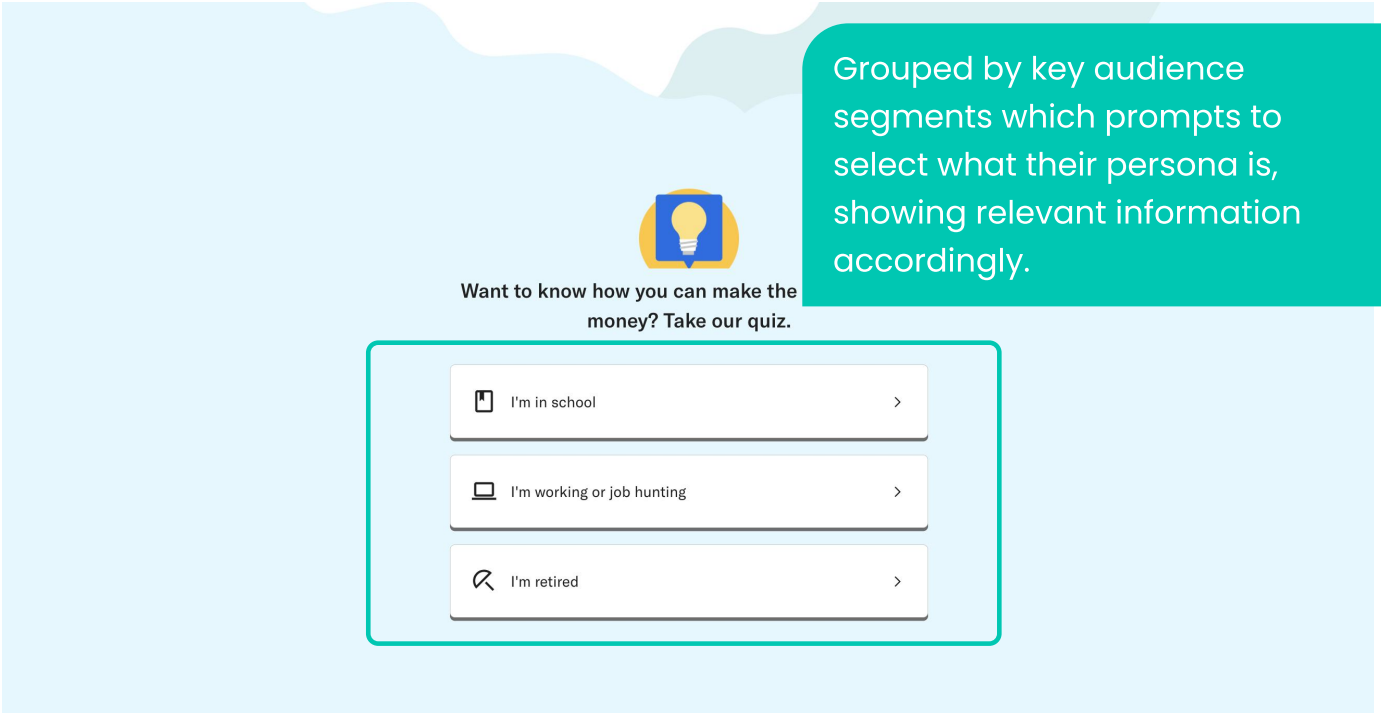




Syllabus

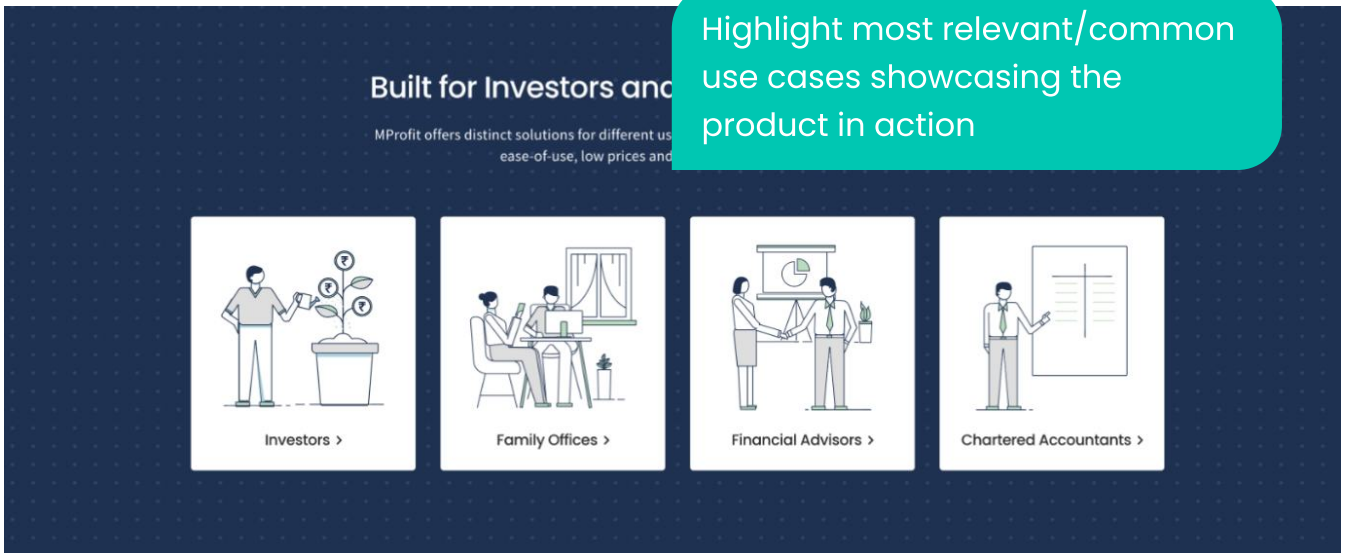


MProfit



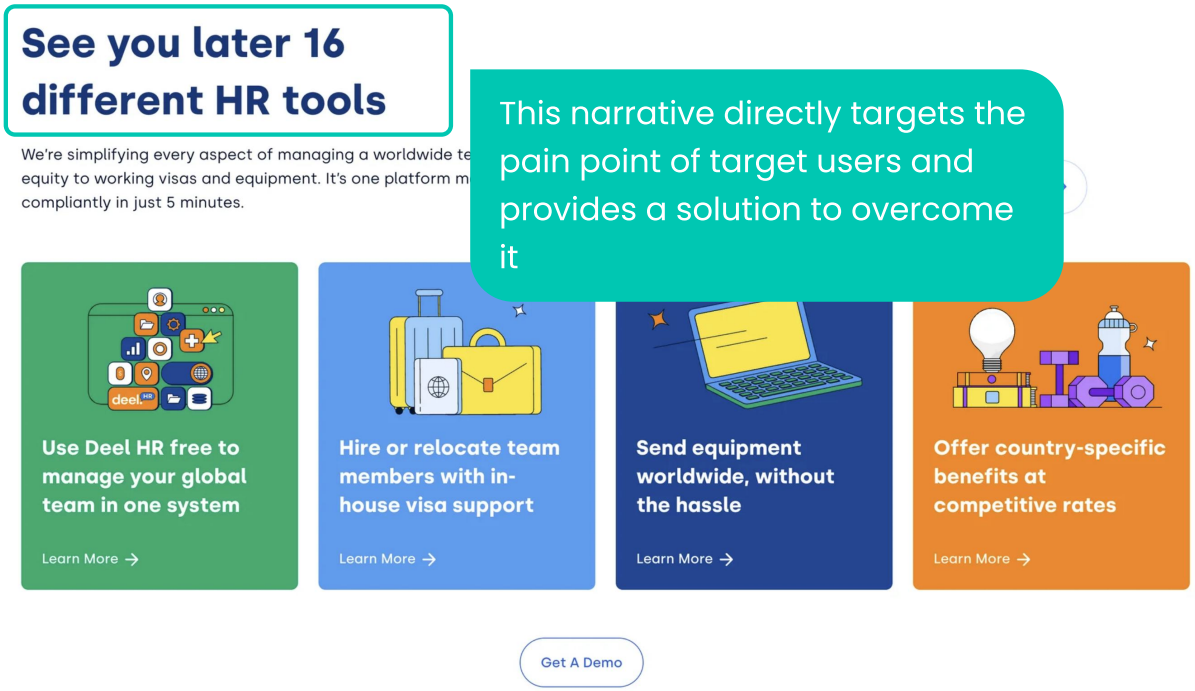
Grouped by key audience segments which prompts to select what their persona is, showing relevant information accordingly.

Betterment



Highlight most relevant/common use cases showcasing the product in action

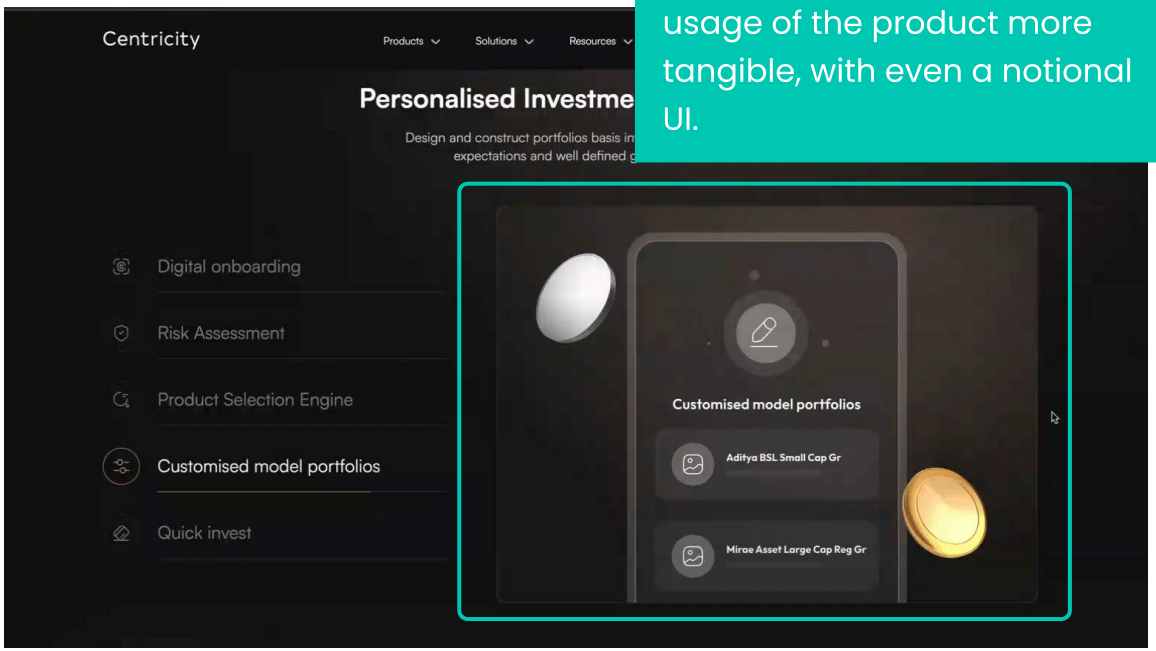
MProfit



This narrative directly targets the pain point of target users and provides a solution to overcome it

Deel

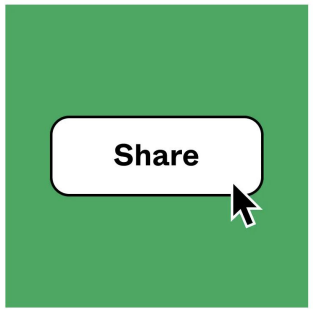
Provide visual cues to make the usage of the product more tangible, with even a notional UI.



Centricity

Why choose Figma over Adobe XD?







Comparisons can help users in identifying how well a product fits their needs, subtly answering objections.

Figma

Faster in the cloud

With Figma, your files just live on the Web. No more version mixups. No more cloud syncing. No more transferring files between your work and personal computers.

Collaboration first

Figma was purpose-built for collaboration. Sharing files is a breeze, and collaborators have the right context to give the right feedback. Collaboration features are hard to tack on to an existing product.

No detail too small

Designers who've tried both Figma and Adobe XD tell us the difference is in the details. Figma pays attention to the smallest of product details (because we know you do).

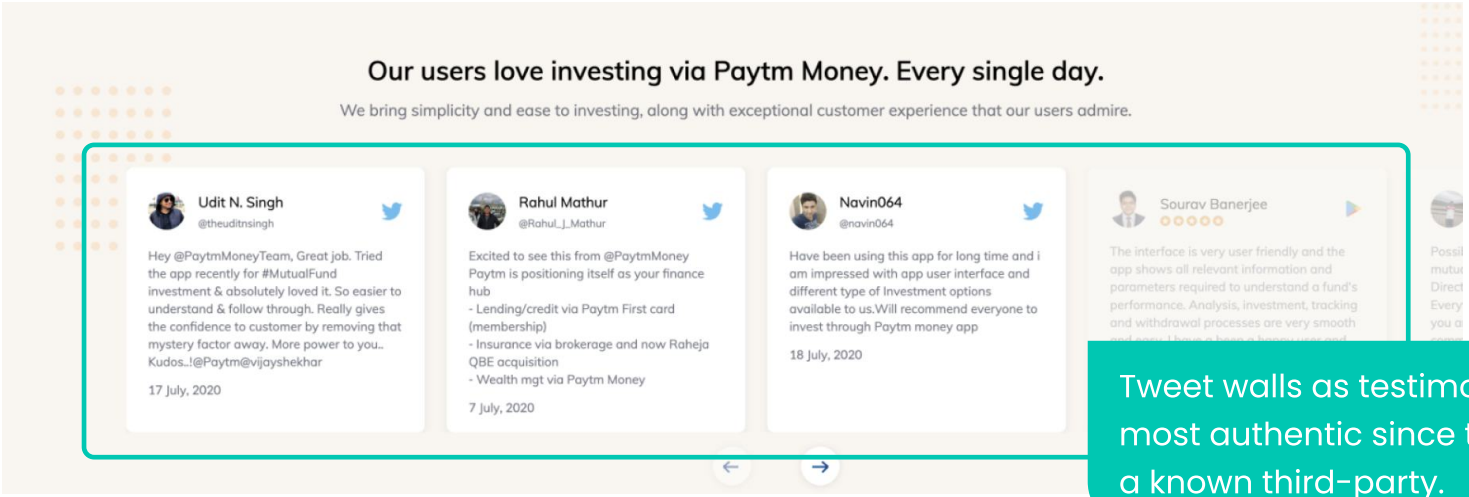
Comparisons can help users in identifying how well a product fits their needs, subtly answering objections.

Gitlab

Why GitLab Platform Solutions Pricing Resources

Compare all features

	Free	Premium	Ultimate
	$0 per user/month No credit card required Get started >	$29 Per user/month Billed annually at $348 USD Buy Premium	$99 per user/month Billed annually at $1188 USD Buy Ultimate
Compute minutes per month	400 compute minutes	10,000 compute minutes	50,000 compute minutes
Storage	5GB	50GB	250GB
Transfer per month	10GB	100GB	500GB
Open Source - MIT License	✓	✓	✓
Bring your own GitLab CI runners	✓	✓	✓
Includes free static websites	✓	✓	✓
Faster code reviews		✓	✓

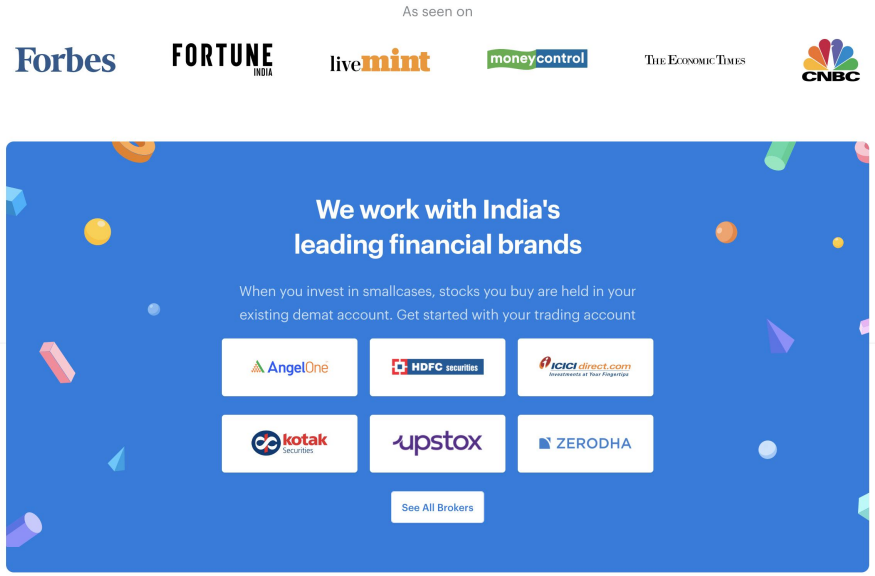


PayTM

Tweet walls as testimonials look the most authentic since these are from a known third-party.

Coverage from sources the visitor already implicitly trusts allows borrowing from that trust.

Smallcase



MProfit

MProfit is trusted by

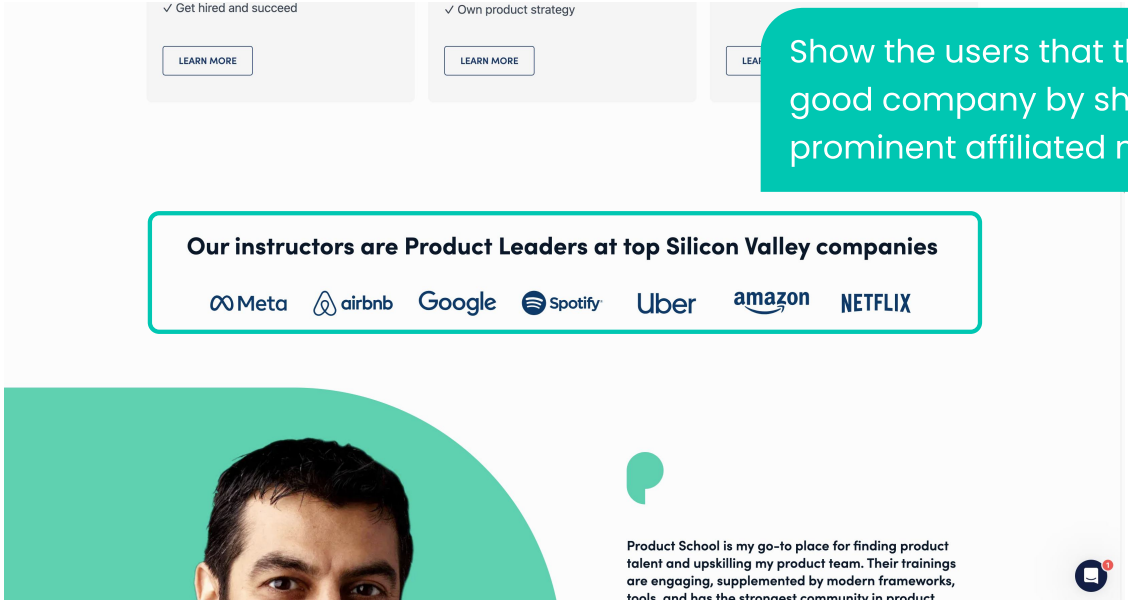
Indian & NRI Investors, prominent Financial Advisors & Brokers, reputed CA firms & so

Establish credentials by showing support from recognised/trusted entities.

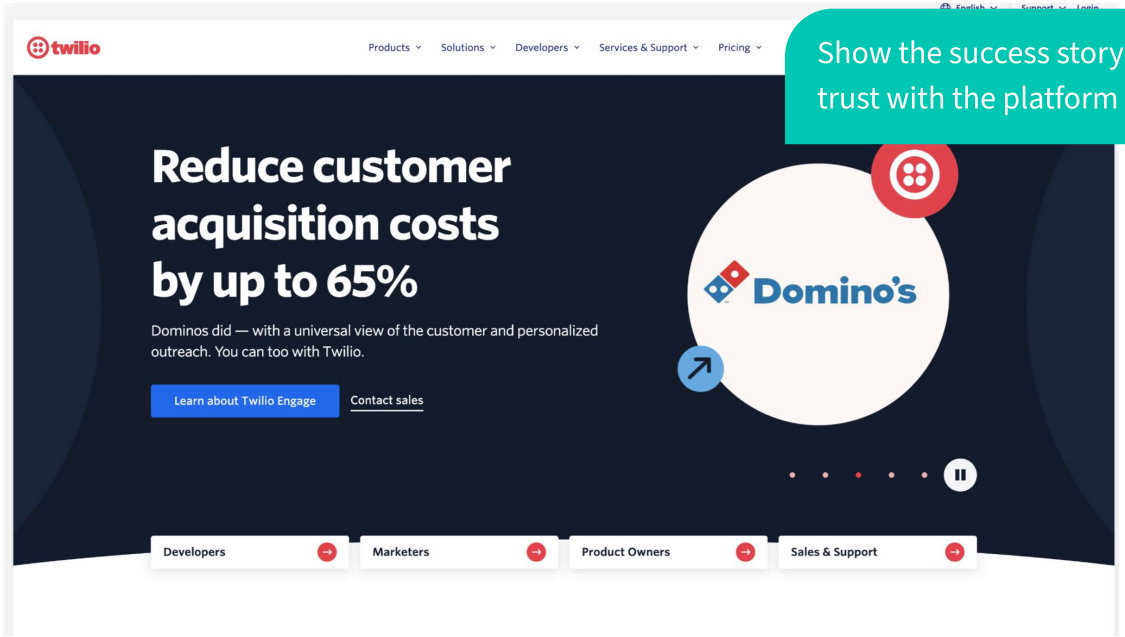
BARCLAYS · CGSCIMB · JM FINANCIAL · Pidilite

shemaroo INDIA KHUSH HUA · TRADE SMART · BHARAT FORGE KALYANI · capitalmind

Product School



Show the users that they're in good company by showcasing prominent affiliated members.



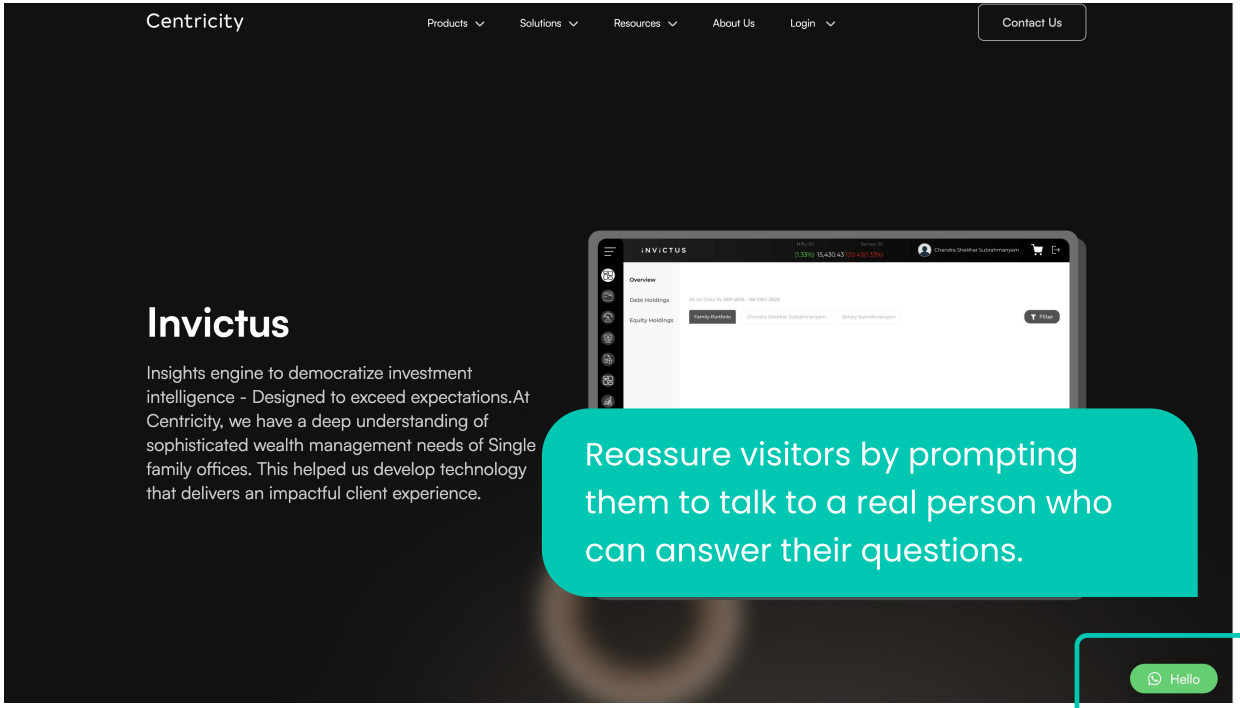
Show the success story upfront to build trust with the platform

Product School

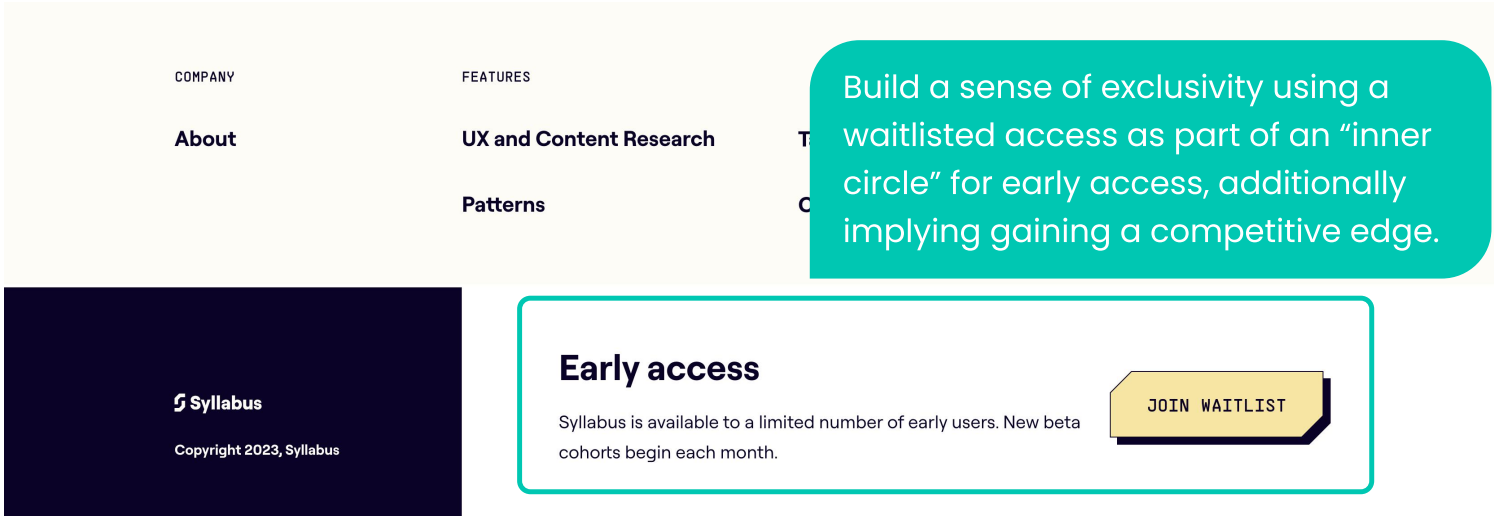
FAQs save time and effort by providing readily accessible information, reducing barriers associated with adoption.

Wealthfront





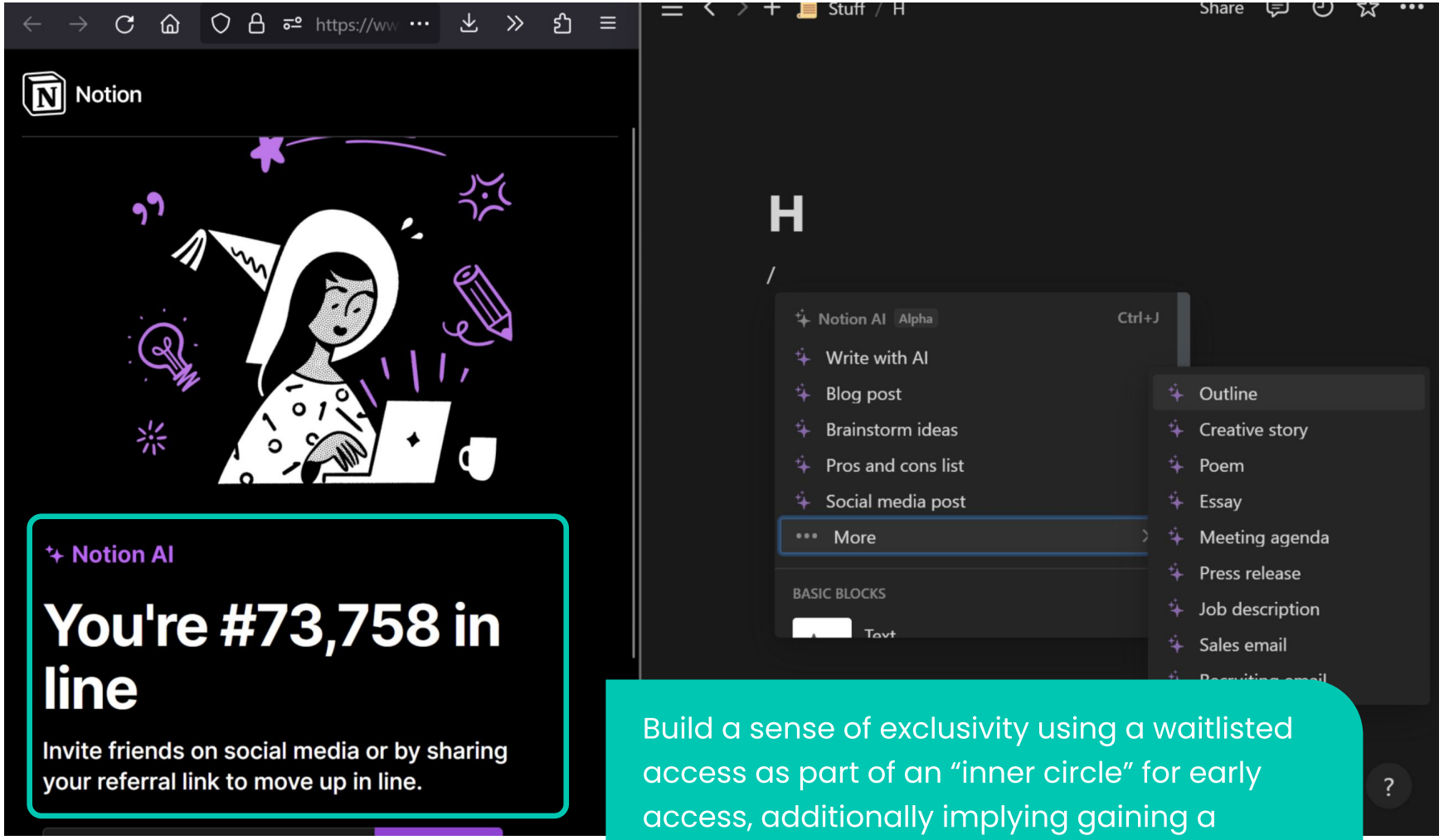
Centricity



Build a sense of exclusivity using a waitlisted access as part of an “inner circle” for early access, additionally implying gaining a competitive edge.

Syllabus

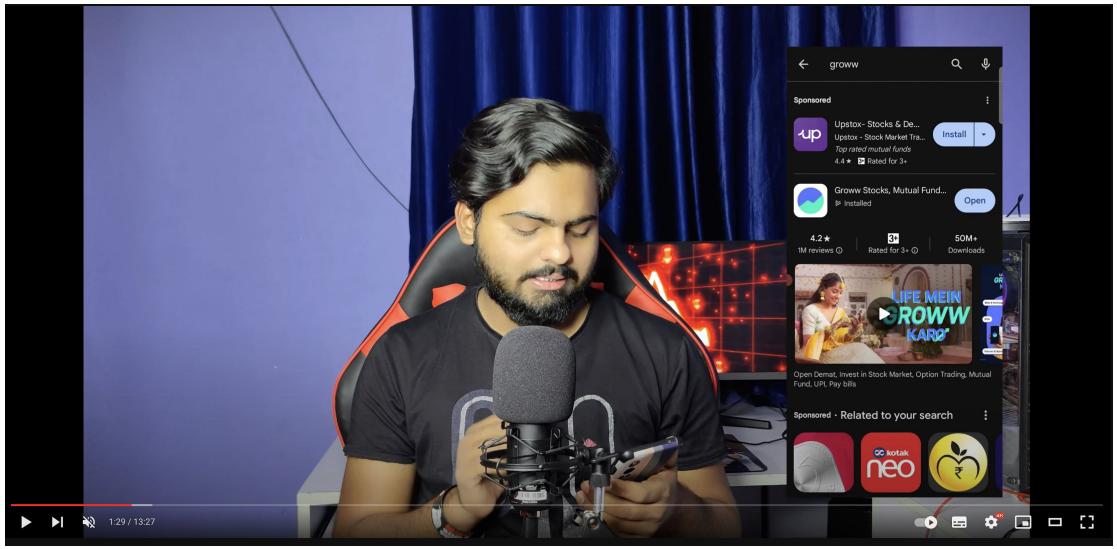
Syllabus



Build a sense of exclusivity using a waitlisted access as part of an “inner circle” for early access, additionally implying gaining a competitive edge.

Video References





The team couldn't directly test competitors' products due to the requirement of an ARN Code, which is exclusive to brokers. To explore the features and user flows of the competitors products, the team reviewed demo videos for each one.

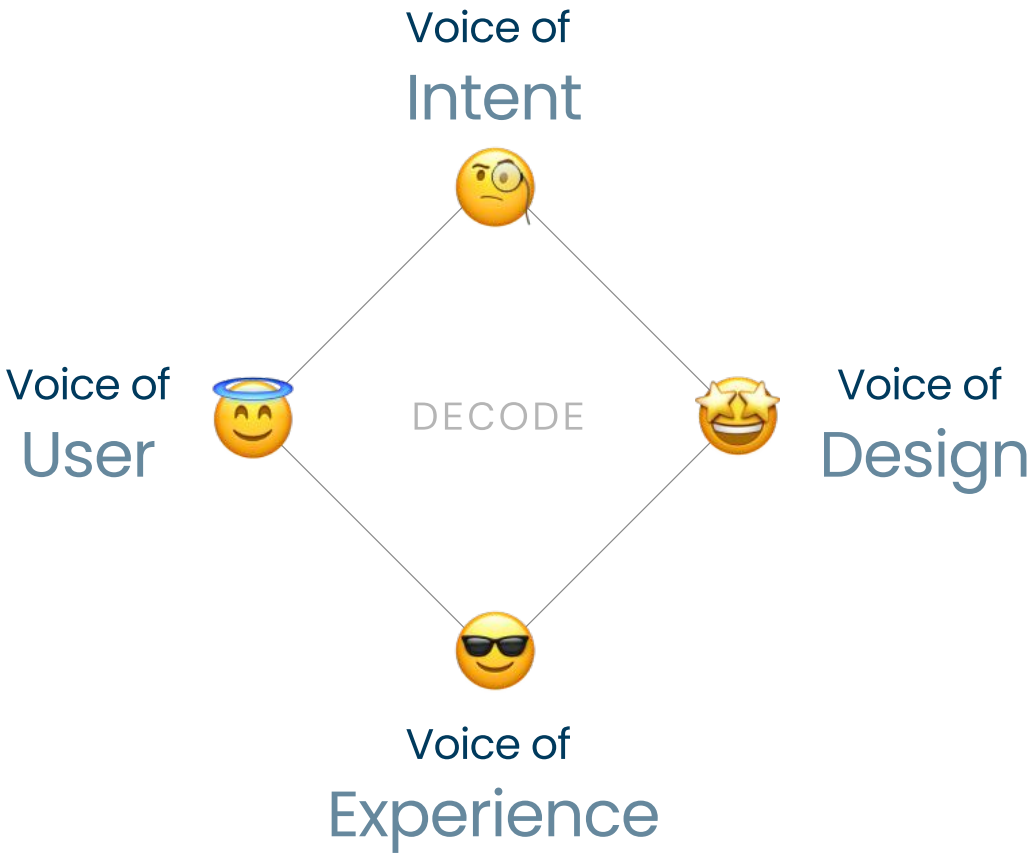
Primary research

Several interviews were conducted with experienced brokers who work closely with clients and manage their finances. Additional interviews were deemed unnecessary because the client, being an expert in this field, provided valuable insights into the challenges brokers might face.

How do we build the perfect product?

4 Voices

In design, the four "voices" often refer to the perspectives or considerations that need to be balanced to create effective and user-centered solutions.



Voice of Intent

To transform the way mutual fund distributors operate by enabling them to serve their clients and scale their business in new and more effective ways, delivering personalisation at scale.



Create a platform that serves as a one-stop 9-5 tool for distributors

Insights from an MFD

Name: Darshana | Platform used: Investwell | Number of clients: 250

1. Most investors need to be educated about mutual funds

"We have to make them understand the value of long term returns. They generally want to see results in 2 years. They are very used to FDs and ULIPs."

2. Everything in one view

"It would be great if all the information is shown in one page and we don't have to navigate to other pages to get all the information."

3. Platform choice influenced by the fee / size of AUM

"Cost plays a very important role in the choice of the platform. Distributors with larger AUMs can afford better platforms with more features."

Voice of User



Sole Proprietor

- Avg. AUM: ?
- Client Management Channels: WhatsApp, Email

Add a personal touch to customer interactions at scale

Get a unified view for family accounts

Take away manual involvement

Manage clients' greed-buy and panic

Clients unable to visualise long-term returns

Estimate trail commission income

Increase my AUM

Encourage SIPs and long-term holdings

Avoid needing to login multiple times a day

Competing with Direct mode of investment (Rise of DIY investing)

Learn from the community



Investment Firm

- Avg. AUM: ?
- Typical Team Size: ? Members
- Client Management Channels: WhatsApp, Email

Resources to grow my business

Insights into my customers

Showcase my brand as trustworthy

AMC MarComm reaches out to investors directly with new plans

Each team member needs their own login

Advice is normally taken for granted, not seen as a paid service

Need a way to drill-down and see team performance

Provide the comfort of human connection to clients, without diluting the brand

Voice of Experience

Show client-related insights

Show growth-related insights

Cross selling & Upselling Opportunities

Meaningful analytics that trigger actions

Performance and Responsiveness

Best practices

Reduce dependency on 3rd party platform

Contextual Support/FAQs

CRM Automations

Help MFDs offer more products

Seamless Data Integration

Help distributors with DSP knowledge

Help distributors scale

CRM Automations

Get a unified view for family accounts

Add a personal touch to customer interactions at scale

Clients unable to visualise long-term returns

Manage clients' greed-buy and panic

Showcase my brand as trustworthy

AMC MarComm reaches out to investors directly with new plans.

Show client-related insights

Provide the comfort of human connection to clients, without diluting the brand

CRM

Customer Relationship Management

Meaningful analytics that trigger actions

Insights into my customers

Estimate trail commission income

Help distributors with DSP knowledge

Learn from the community

Need a way to drill-down and see team performance

Insights

Help distributors scale

Resources to grow my business

Knowledge sharing

Increase my AUM

Take away manual involvement

Cross selling & Upselling Opportunities

Help MFDs offer more products

Encourage SIPs and long-term holdings

Growth

Distributors

compoundexpress

User Persona

Nikunj

MFD (Sole Proprietor)

- 35-year-old financial professional
- Sole proprietor running his own MFD business in a bustling urban area in India, catering to individuals and families
- 10 years of experience.
- 5 Cr AUM
- Also works as a Life Insurance Corporation (LIC) agent.

WHAT'S HOLDING HIM BACK?

1. Managing multiple platforms
2. Scattered data
3. Verification of reports
4. Managing service requests (fill individual forms)
5. Need external tools for customer management
6. Another platform for business growth
7. Geographic constraints

WHAT ARE THE OPPORTUNITIES?

1. Multi-product distribution (lack of knowledge a potential barrier)
2. Acquiring Knowledge
3. Wallet Share / Performance
4. PMS
5. NPS

Etica Wealth

MFD (Firm)

- 20 years in the business
- Offers a range of financial services, wealth planning and MF
- Diverse client base including individuals, families, and businesses
- 1200 Cr AUM

WHAT'S HOLDING THEM BACK?

1. Adherence to all regulatory standards and minimize the risk of legal issues
2. Loss of clients to direct plans, large firm not seen as "personal"
3. No dedicated team to run marketing campaigns to attract new customers and upsell to exiting ones
4. Ensuring any rebalancing or other proposals are backed by data
5. Reluctant to share client data with third-party

WHAT ARE THE OPPORTUNITIES?

1. Task management (auto-assign)
2. Plan succession
3. Establish as a corporate / person dependant to process dependant
4. Build deeper relations across generations
5. Reduce manual effort of data reconciliation

Design Principles

1. Keep distributor's customer as the hero *over* being overtly distributor focused

In the investor post-login experience, add points of interaction which contribute to overall customer satisfaction.

2. Personalisation *over* Standardisation

Allow distributors to customise reports for specific clients based on their unique requirements.

3. Show what the numbers mean *over* Just the numbers

Contextualise quantitative data with qualitative insights.

4. Showing *over* Telling

Visualise the impact instead of needing the user to interpret it.

5. Pre-empt *rather than* investigate

Distributor can be prompted if a scheme they are exploring is useful for any other clients rather than them needing to check this for every client.

6. Sophistication *over* minimalism

A flexible dashboard which can be customised to show KPIs with increasing levels of specificity.

HMW

- Help distributors communicate their importance to the investors ✅
- Reduce time to service ✅
- Grow their income
- Manage emotions of their investor (especially redemption) ✅
- Show they are knowledgeable in front of the investors
- Reduce transaction related anxiety
- Ease of txn, reduce failure, and tracking
- Make team management easier/robust ✅
- Make the ROI of CE tangible
- Make it easier to onboard new clients/sourcing ✅
- Ensure data completeness/accuracy without reconciliation issues ✅
- Help MFDs understand importance of digital platforms in growing AUM
- Give investor-level insights to generate more investments

- Drive customers to rely on distributor as a single source of truth
- Make CE the preferred platform for distributor
- Grow their business
- Make distributor look smarter
- Help distributor serve clients better
- Help distributor ease client concerns
- Automate MFD workflows
- Be the MFDs best employee
- Increase daily productivity / without needing to invest dedicated time
- Present recommendations backed by data
- Help ease migration
- Reduce uncertainty for new platform
- Become talk of the market
- Gain trust
- Enable adding insights to reports

HMW

- Nudge a user to take action
- Develop a marketable asset for cross-selling/upselling/ -- drive a premium
- Help distributors and investors arrive at an investment strategy/amount/etc.
- Automate tax-related optimisation alerts/reports
- Account for possibility of enterprise deployments of CE
- HMW predict income more reliably?
- Help distributor get a handle on their business?
- Help clients see their distributor's importance
- Reduce time to service
- Manage investor sentiment/emotions
- Look more knowledgeable
- Reduce txn reliability anxiety

HMW

HELP DISTRIBUTORS ACQUIRE NEW CUSTOMERS + MAKE IT EASIER TO ONBOARD NEW CLIENTS/SOURCING

1. Campaign management
2. WhatsApp-sharable Investor Nudges (Digital flyers)
3. Referrals
4. Distributor Marketplace / Guided Journey

REDUCE TIME TO SERVICE

1. Enable DIY for customers
2. Investment Baskets

MANAGE EMOTIONS OF THE INVESTOR

1. Interactive graph of historic data (with nudges)
2. Personalised financial story
3. Opportunity nudges

MAKE TEAM MANAGEMENT EASIER / ROBUST

1. Auto task assign + task completion
2. Business targets, sales targets
3. Communication channel / 3rd party integration

HMW

HELP DISTRIBUTORS COMMUNICATE THEIR IMPORTANCE TO THE INVESTORS

1. Platform-generated “What this means for you” communique for market events (e.g. SEBI reg., annual budget, etc.) which the MFD can share with the clients
2. Additional layer on top of this can be per-user personalisation
3. Goal-based investment mgmt
4. Generate reports for investors’ portfolio
5. Visualise impact of proposals against the investor’s portfolio
6. Include “insights” to surface information which would otherwise not be obvious

ENSURE DATA COMPLETENESS/ACCURACY WITHOUT RECONCILIATION ISSUES

1. Identify and inform the MFD when data might be incomplete/outdated
2. [is this more of a tech solve?]

Stakeholders



Client

B2B



Company



Advisors

B2C

Who is this product made for?

Mutual Fund Distributors(Sole proprietors)

Mutual Fund Distributors(Investment Firm)

insurance Agents

Loan Service Providers

AMCs

CompoundExpress - Product

It is one of the first product in India where the distributors can handle all the finances of their client in one platform. The platform also give timely nudges about the pending payments and insights on different clients depending on their AUM (assets under management).

This product has two main modules for Mutual Fund and Loans Against Mutual Fund.

Mutual Fund

- Onboarding
- Dashboard
- Transaction
- Reporting
- Product Catalogue
- Service Requests

Loans Against Mutual Fund

- Onboarding
- Dashboard
- Active Loans
- Commission
- Leads Listing
- Client Loan Detail

LAMF(Loans Against Mutual Funds) have the same pages of Mutual Fund segments.

The above mentioned modules and sections will be accessible through three channels for both B2B and B2C users:

- Web
- Mobile Web (M-Web)
- Mobile App (iOS & Android)

This project utilizes an app-centric design philosophy. While the core components are optimized for the mobile app experience, they are also built to be responsive and function seamlessly across web and mobile web platforms.

Design System

A design system is a central hub for all the building blocks of your product's design. It includes reusable components, colour palettes, fonts, and design guidelines. This ensures consistency across interfaces and streamlines the design process, saving time and resources. The ones documented are the components used across the whole platform, there are other components that are page or module specific.

Colours

Primary Colours: These are the colours that are most frequently used across the UI and imparts a distinct identity to our products. Using brand colours as primary colours strengthens brand awareness.



CX Indigo

#003A5D

RGB (0, 58, 93)



CX Cyan

#00C7B2

RGB (0, 199, 178)

Secondary Colours



Green

#71C562

RGB (113, 197, 98)

Amber

#FFBF00

RGB (255, 191, 0)



Red

#FF6961

RGB (255, 105, 97)

Teal-20

#A8E9E2

RGB (168, 233, 226)



Teal-50

#80E3D8

RGB (128, 227, 216)

Teal-10

#E5F9F7

RGB (229, 249, 247)

Teal-5

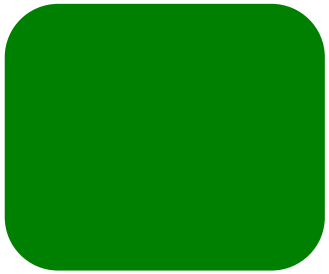
#F2FCFB

RGB (242, 252, 251)

Teal-3

#F7FDFD

RGB (247, 253, 253)



Green-Darker

#008000

RGB (0, 128, 0)



Indigo-80

#33617D

RGB (51, 97, 125)



Indigo-60

#66899E

RGB (102, 137, 158)

Indigo-20

#CCD8DF

RGB (204, 216, 223)

Indigo-10

#E5EBEF

RGB (229, 235, 239)

Indigo-5

#F2F5F7

RGB (242, 245, 247)

Indigo-3

#F7F9FA

RGB (247, 249, 250)

Neutral Colours



Grey

#222222

RGB (34, 34, 34)



Grey-6

#666666

RGB (102, 102, 102)



Grey-9

#999999

RGB (153, 153, 153)

Grey CCC

#CCCCCC

RGB (204, 204, 204)

Grey E6

#E6E6E6

RGB (230, 230, 230)

Grey F4

#F4F4F4

RGB (244, 244, 244)

Grey F7

#F7F7F7

RGB (247, 247, 247)

Blue-Grey 1

#D5DDE5

RGB (213, 221, 229)

Blue-Grey 3

#F7F9FA

RGB (247, 249, 250)

White

#FFFFFF

RGB (255, 255, 255)

Off-White

#FEFEFE

RGB (254, 254, 254)

Background Colours

Light

#F7F9FA

RGB (247, 249, 250)

White

#FFFFFF

RGB (255, 255, 255)

Surface Colours

Primary

#00C7B2

RGB (0, 199, 178)

Dark

#003A5D

RGB (0, 58, 93)

Grey

#222222

RGB (34, 34, 34)

Warning

#FFFBE4

RGB (255, 251, 228)

Error

#FF6961 (6%)

RGB (255, 105, 97) 6%

Frosted-Glass-Light

#FFFFFF (80%)

RGB (255, 255, 255) 80%

Off-White

#FEFEFE

RGB (254, 254, 254)

Content Colours

Dark

#003A5D

RGB (0, 58, 93)

Body

#666666

RGB (102, 102, 102)

Light

#FFFFFF

RGB (255, 255, 255)

Link

#00C7B2

RGB (0, 199, 178)

Error

#FF6961

RGB (255, 105, 97)



Placeholder

#999999

RGB (153, 153, 153)



Positive

#00DB68

RGB (0, 219, 104)

Warning

#FFBF00

RGB (255, 191, 0)

Light-Faded

#FFFFFF (60%)

RGB (255, 255, 255) 60%



Label

#666666

RGB (102, 102, 102)

Stroke Colours

Dark

#003A5D (20%)

RGB (0, 58, 93) 20%



Darker

#003A5D (60%)

RGB (0, 58, 93) 60%



Focused

#003A5D

RGB (0, 58, 93)



Brand

#00C7B2

RGB (0, 199, 178)



Error

#FF8680

RGB (255, 134, 128)

Warning

#F5DC60

RGB (245, 220, 96)

Text Style

Owing to its robust scalability and legibility at all sizes, we have chosen Inter as the primary typeface for the platform.

Inter

compoundexpress

Desktop: Heading

H1 Larger - Font-size: 42px - Font-weight: Semibold

H1 Large - Font-size: 32px - Font-weight: Bold

H1 - Font-size: 24px - Font-weight: Semibold

H2 - Font-size: 22px - Font-weight: Semibold

H3 - Font-size: 18px - Font-weight: Semibold

H4 - Font-size: 16px - Font-weight: Semibold

H5 - Font-size: 14px - Font-weight: Semibold

Desktop: Content

Content Meta - Font-size: 14px - Font-weight: Medium

Content Label - Font-size: 12px - Font-weight: Medium

Desktop: Body

Body Large - Font-size: 20px - Font-weight: Regular

Body Medium - Font-size: 16px - Font-weight: Medium

Body Normal - Font-size: 16px - Font-weight: Regular

Body Small - Font-size: 14px - Font-weight: Regular

Body Tiny - Font-size: 12px - Font-weight: Regular

Desktop: Button Label

Button Label Normal - Font-size: 14px - Font-weight: Semibold

Button Label Small - Font-size: 12px - Font-weight: Semibold

Mobile: Heading

H1 Larger - Font-size: 42px - Font-weight: Semibold

H1 Large - Font-size: 32px - Font-weight: Bold

H1 - Font-size: 24px - Font-weight: Semibold

H2 - Font-size: 22px - Font-weight: Semibold

H3 - Font-size: 18px - Font-weight: Semibold

H4 - Font-size: 16px - Font-weight: Semibold

H5 - Font-size: 14px - Font-weight: Semibold

Mobile: Content

Content Meta - Font-family: Inter - Font-size: 14px - Font-weight: Medium

Content Label - Font-family: Inter - Font-size: 12px - Font-weight: Medium

Mobile: Body

Body Large - Font-family: Inter - Font-size: 20px - Font-weight: Regular

Body Normal - Font-family: Inter - Font-size: 16px - Font-weight: Regular

Mobile: Body

Body Small - Font-family: Inter - Font-size: 14px - Font-weight: Regular

Body Tiny - Font-family: Inter - Font-size: 12px - Font-weight: Regular

Mobile: Label

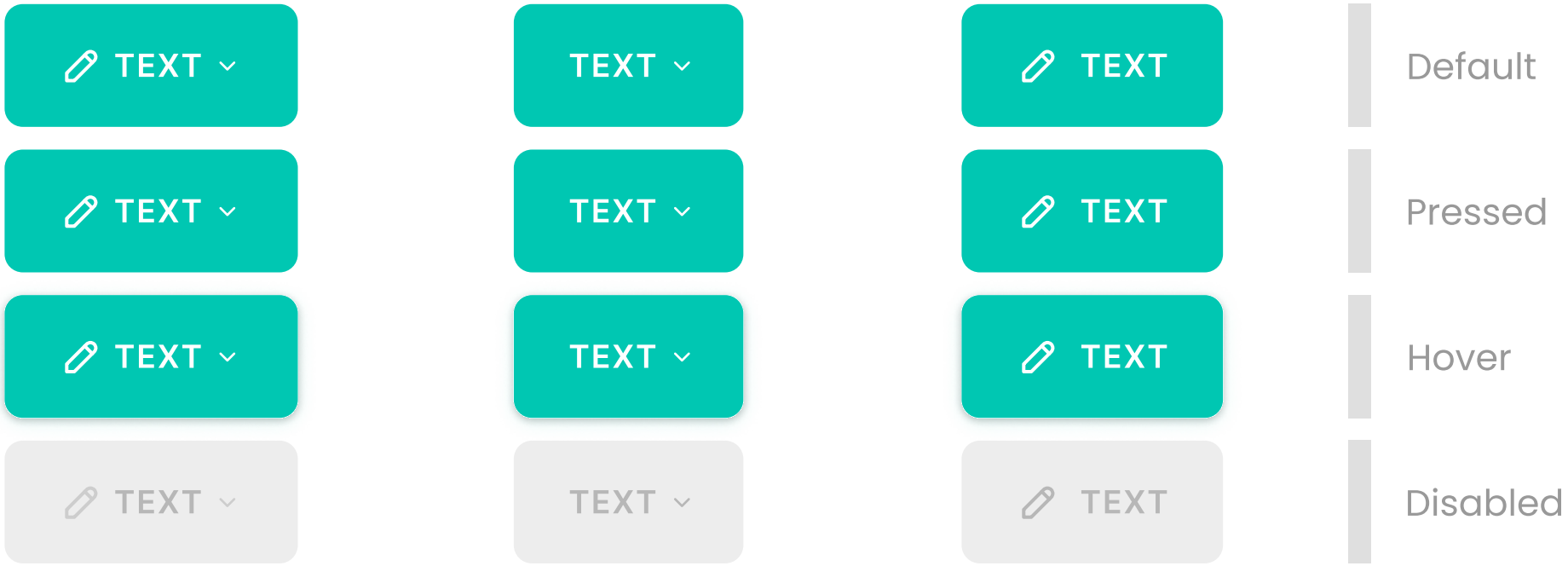
Button Label Normal - Font-family: Inter - Font-size: 14px - Font-weight: Semibold

Button Label Small - Font-family: Inter - Font-size: 12px - Font-weight: Semibold

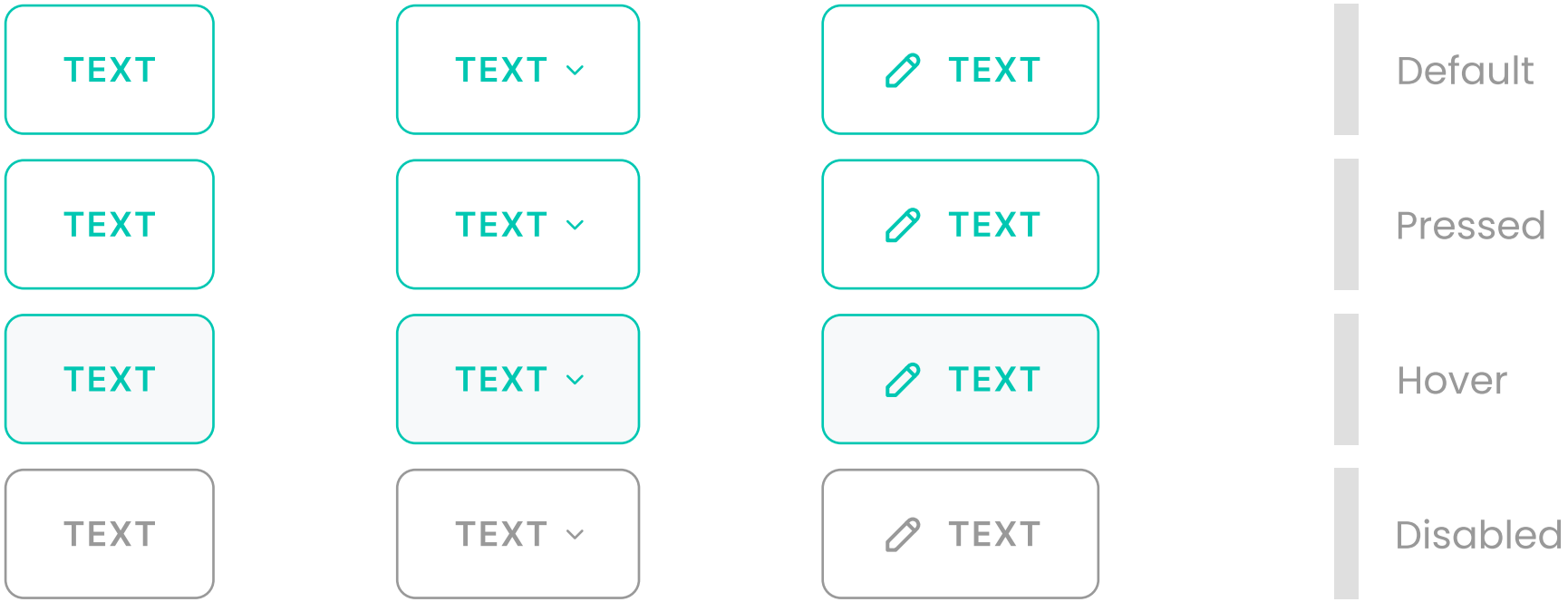
Buttons & Links

Buttons are used to induce people to take certain actions that present a conversion for a particular page or screen.

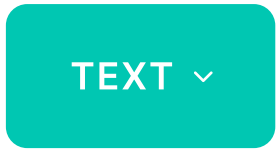
- Primary Buttons: Actions that we want the user to do as often as possible.



- Secondary Buttons: Actions we don't want the user to do, but we provide the option for convenience and usability.



For the above mentioned buttons there are also size variants.

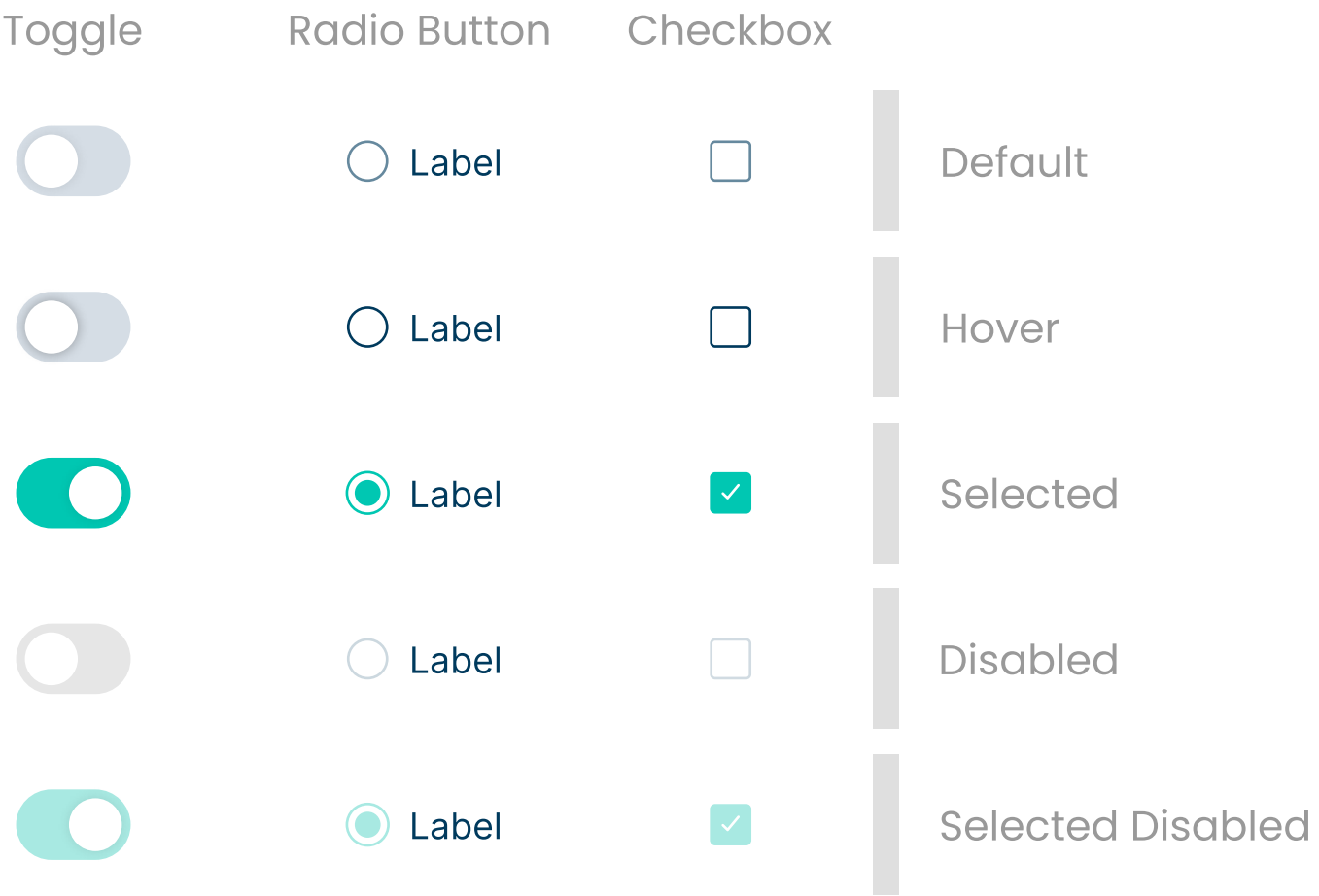
	Large	Medium	Small
Primary			
Secondary			

Below mentioned are the three variations for hyperlink text.

Default	
Hover	
Disabled	

Controls

Controls can be used for form inputs as well as visual representation of different statuses of a user's progress.



Input Fields

Containers improve the discoverability of text fields by creating contrast between the text field and surrounding content.

- Use data that is available to you, like PAN, Folio Number, current date & time, etc. without asking the user.

The inputs shown below are the default size, each of it comes in three sizes.

Password

Default

Label

Hint text

Hint Text

Focused

Label

Hint Text

Filled

Label

Placeholder

Hint Text

Error

Label

Placeholder

Error Message

Pre-filled

Label

Value

Hint Text

Password

Default

Password

Placeholder

Focused

Password

Filled

Password

****

Unmasked

Password

applepie47

Date Range

Default

Label

DD/MM/YYYY

Filled

Label

31/12/2023

Focused

Label

DD/MM/YYYY

October 2023

M	T	W	T	F	S	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

OTP

Default

Enter OTP

Resend after **1:59**

Focused

Enter OTP

Resend after **1:59**

Filled

Enter OTP

1 9 3 4 8 8

Resend after **1:59**

Error

Enter OTP

1 9 3 4 8 8

Invalid OTP

Resend after **1:59**

OTP Timer

OTP TImer

Resend after **1:59**

Expired

Didn’t receive a code? **Send new code**

Dropdown

Default

Label

Placeholder

Hint text

Filled

Label

Selected | 12

Select AMC - Filled

Select AMC

AXIS Mutual Funds

Focused

Label

Placeholder

Option

Option

Option

Option

Select AMC - Focused

Select AMC

Select a AMC

Select All

AXIS Mutual Funds

ICICI Prudential Mutual Funds

DSP Mutual Funds

HDFC Mutual Funds

Select Folio - Filled

Select Folio

24561462 Home Loan

Select Bank Account - Filled

Select Bank Account

HDFC Bank Default

Select Folio - Focused

Select Folio

Select Folio

24561462

24561462 Home Loan

24561462

24561462

Select Bank Account - Focused

Select Bank Account

HDFC Bank Default
SB/********0029

SBI Bank Default
SB/********0029

HDFC Bank Default
SB/********0029

SBI Bank Default
SB/********0029

Text with Prefix

Default

Label

Prefix Hint text

Focused

Label

Prefix

Filled

Label

Prefix Input

Error

Label

Prefix Input

Error Message

Text area

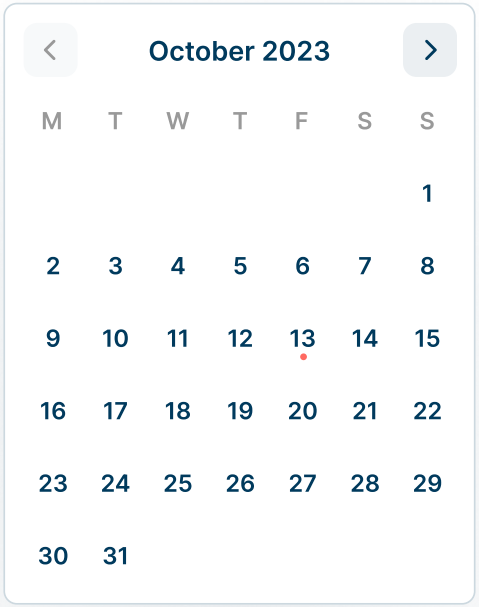
Label

Hint text

Hint Text

Date Picker

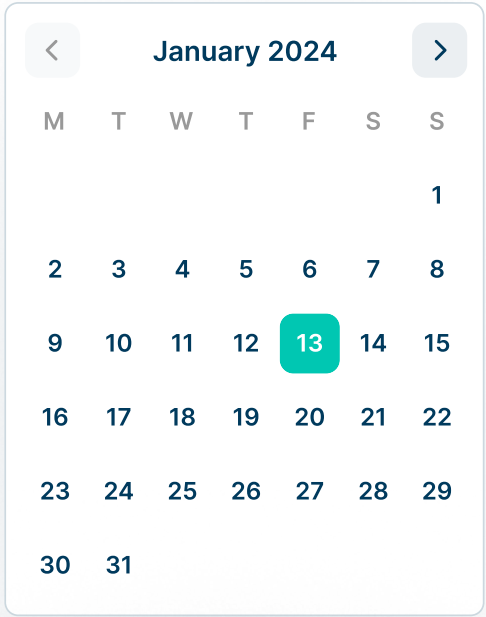
Month

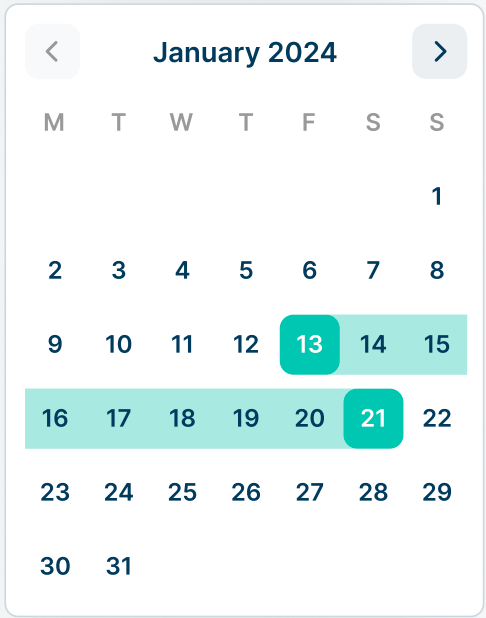


Building Block



Date Range Picker





Navigation System

Header for Desktop

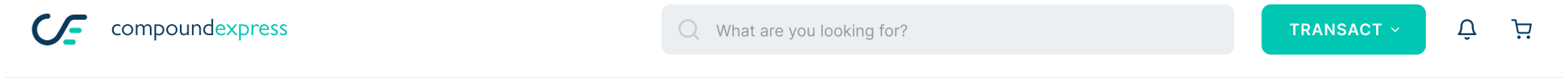
Pre-Login



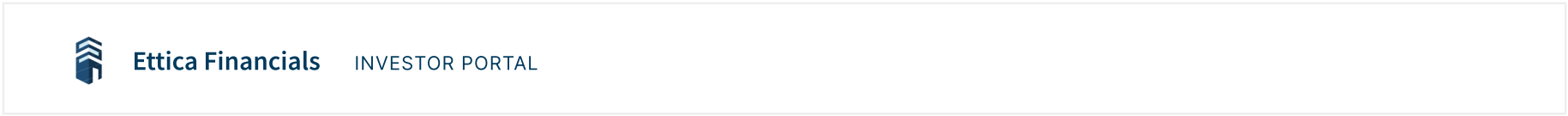
Onboarding



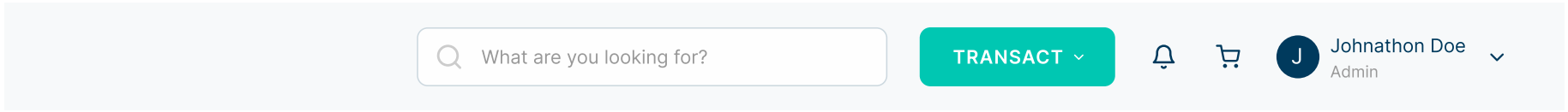
Post Login



Distributor side - B2B



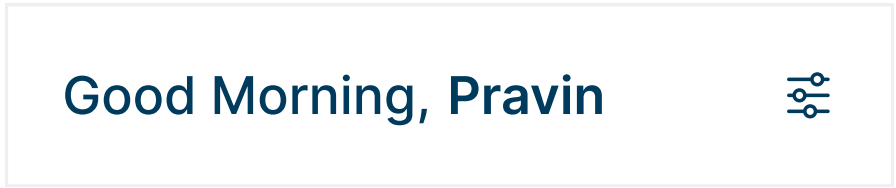
An example of how the header will look like for the end user of the white label product.



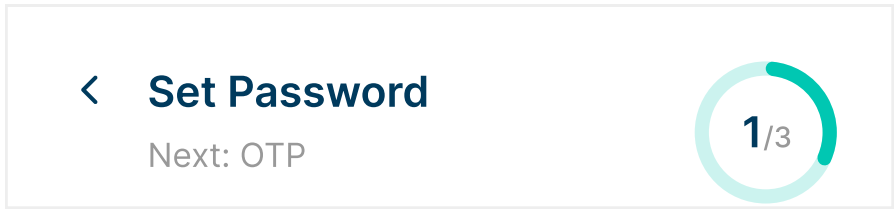
Customer side - B2B2C

Header for Mobile

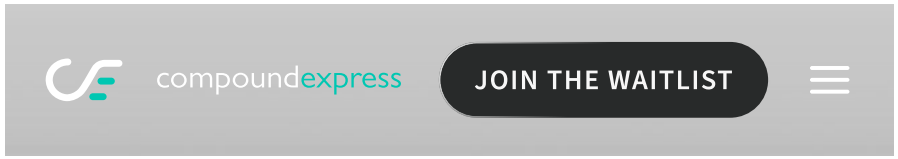
Mutual Fund Dashboard Header

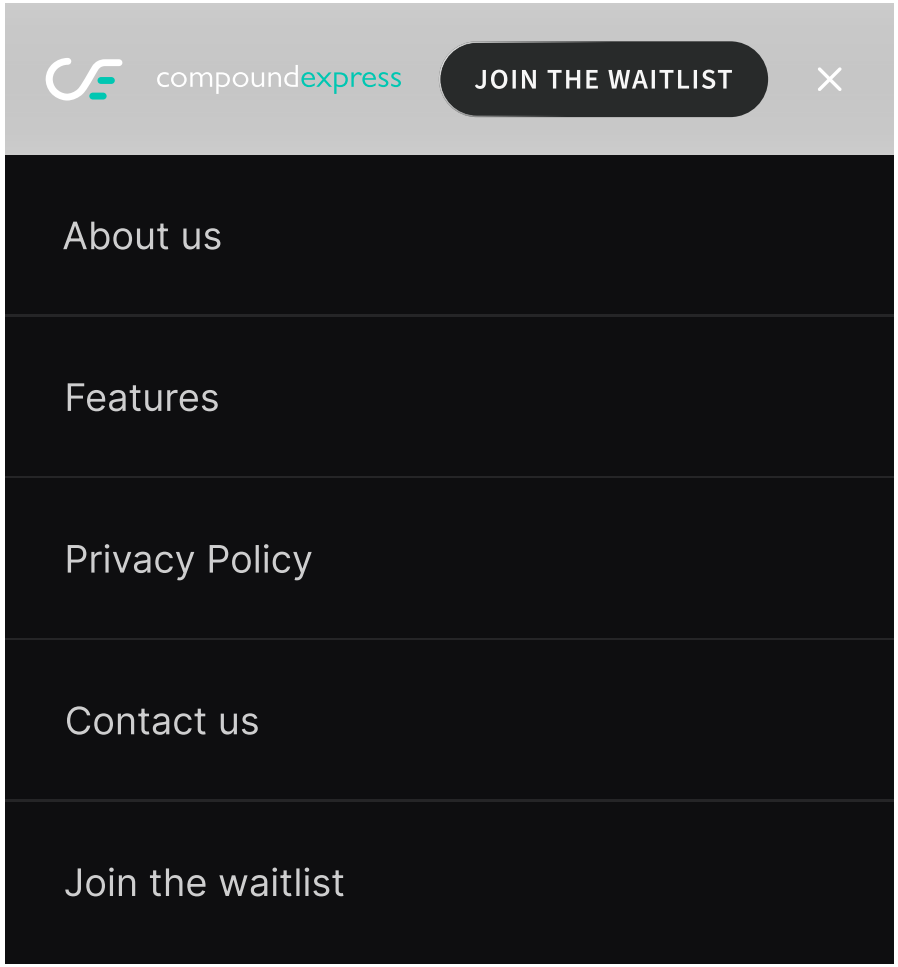


Bottom Sheet Header

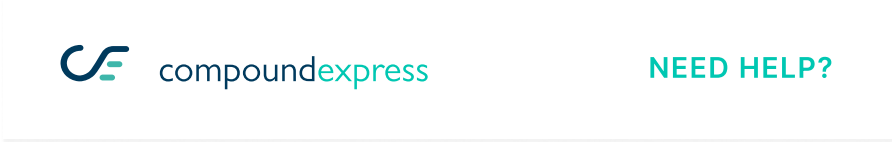


Pre-Login

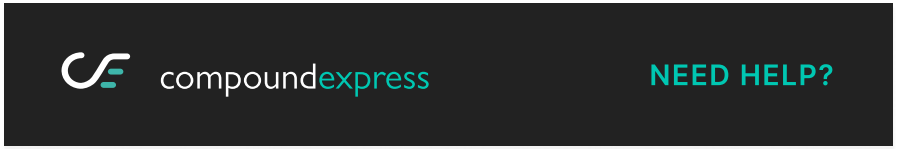




Onboarding

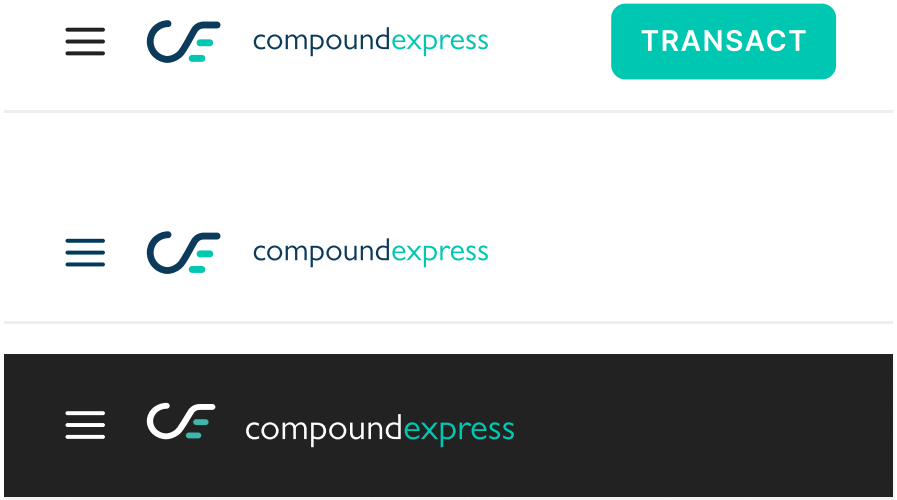


Light Mode



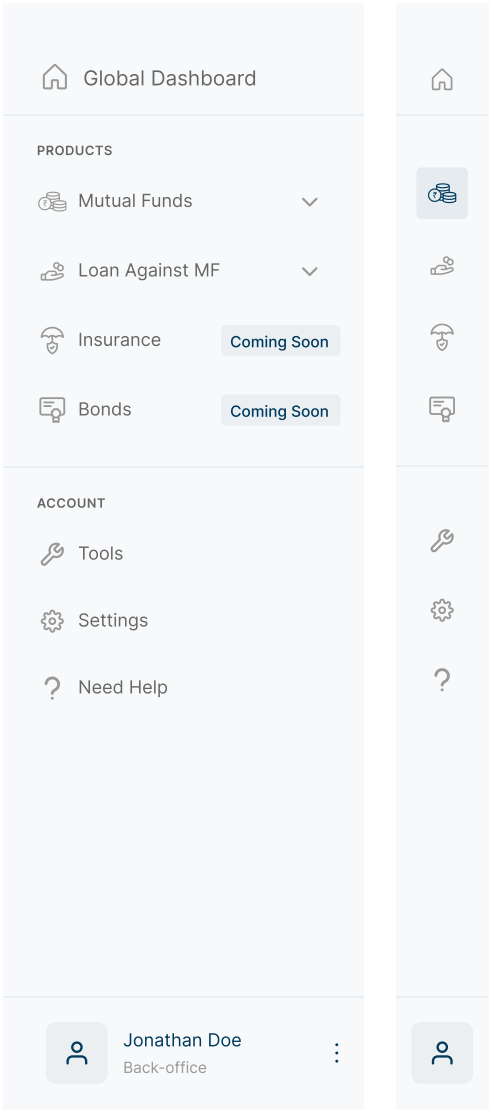
Dark Mode

Post Login

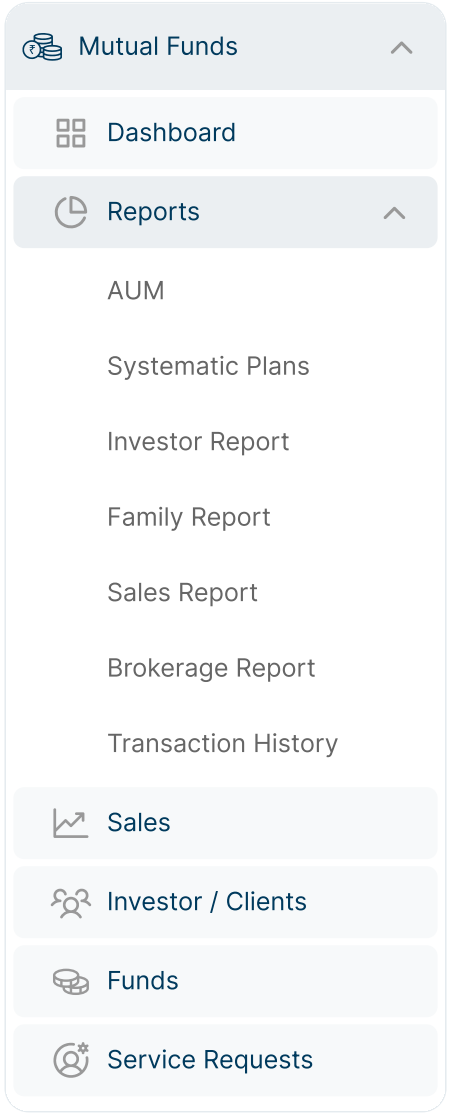


Sidebar for Desktop

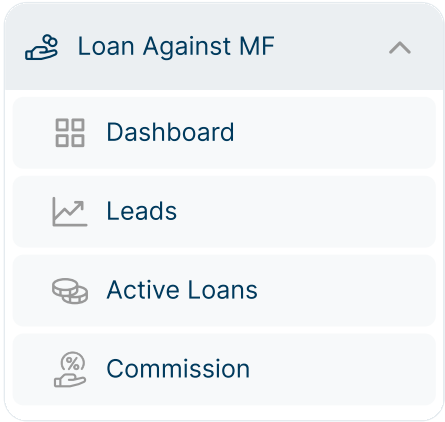
Distributors sidebar



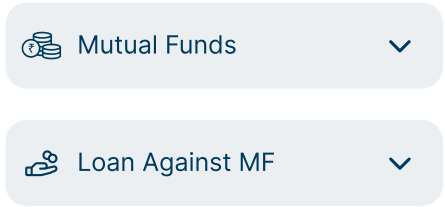
Mutual Fund - Expanded



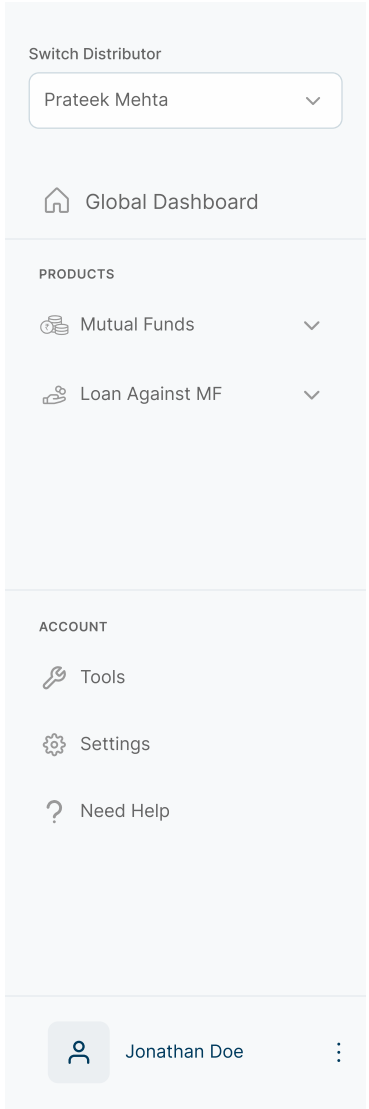
LAMF - Expanded



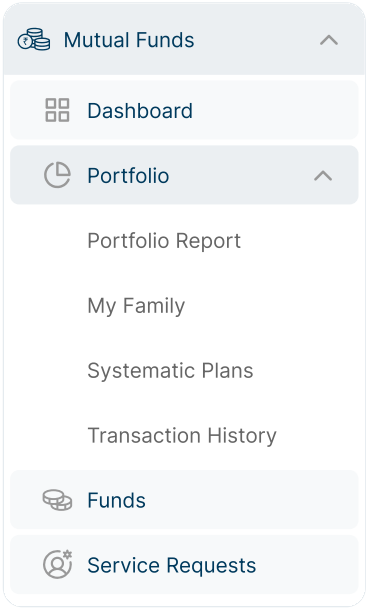
Hover state



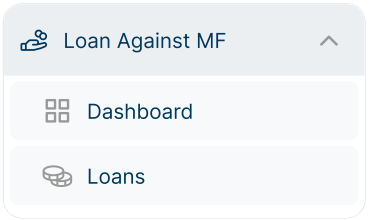
Customer sidebar



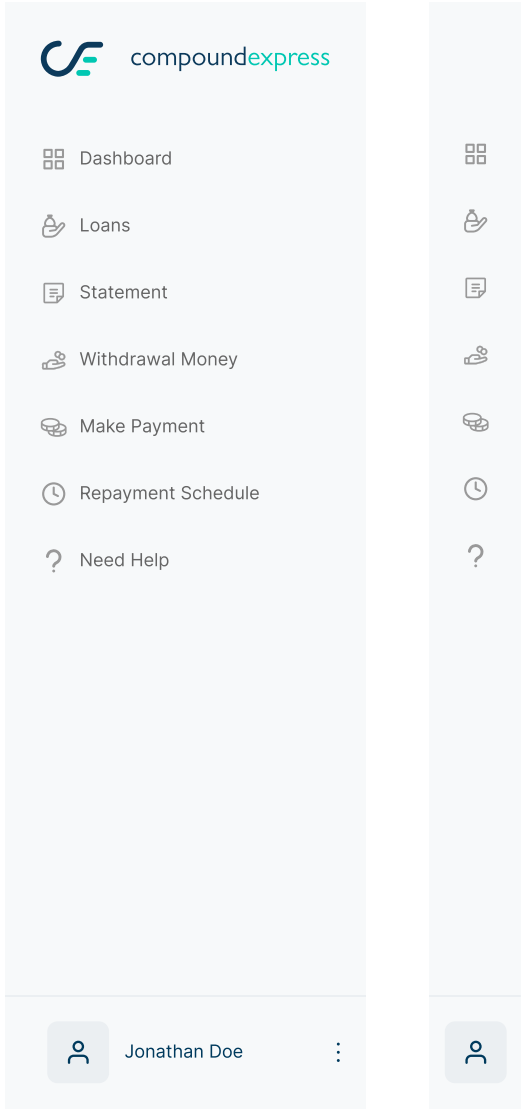
Mutual Fund - Expanded



LAMF - Expanded

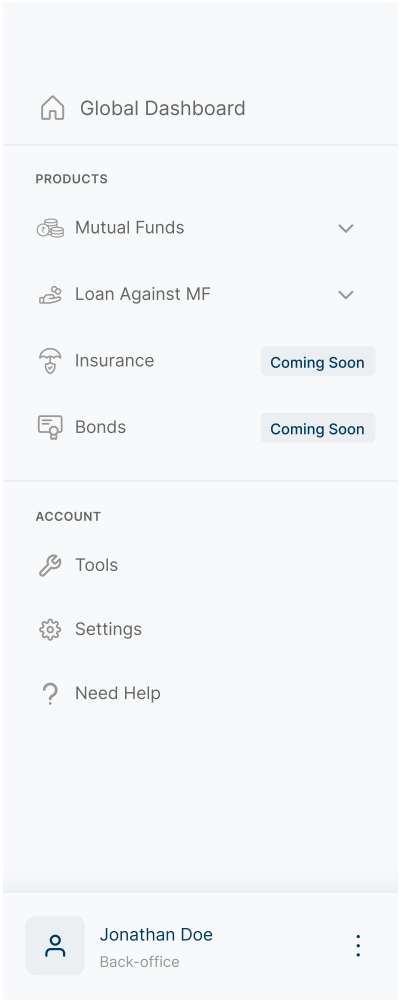


LAMF - Customer sidebar

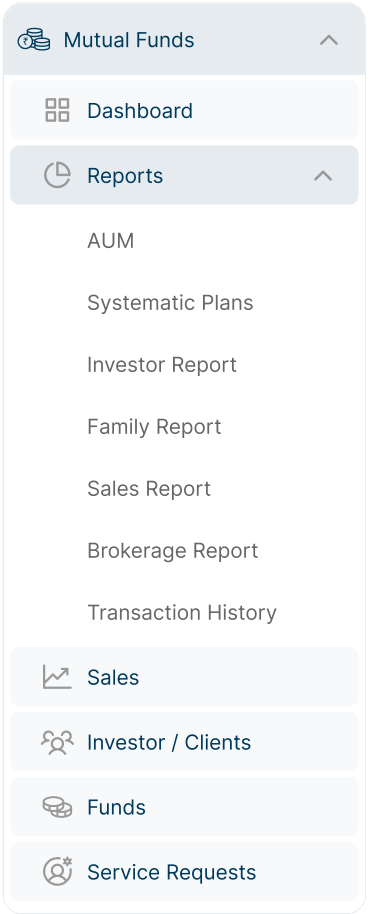


Sidebar for Mobile

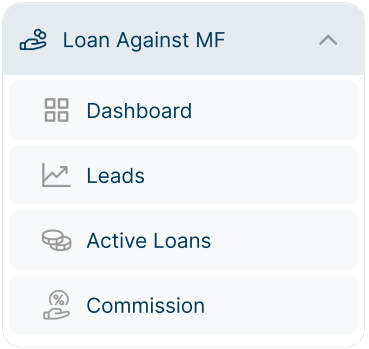
Distributor Hamburger Menu



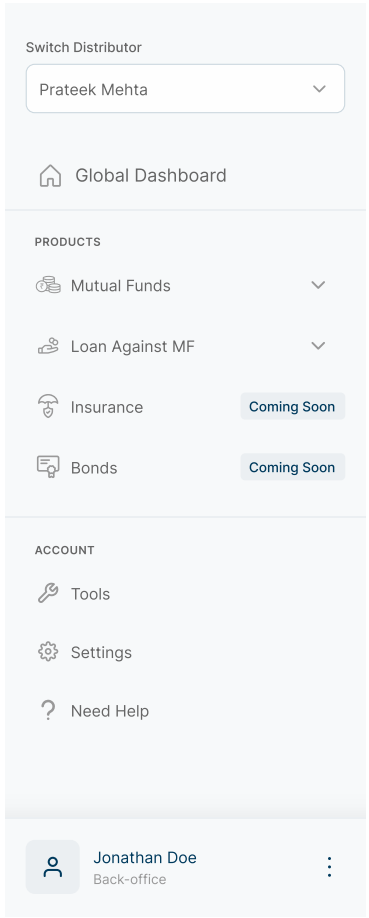
Mutual Fund - Expanded



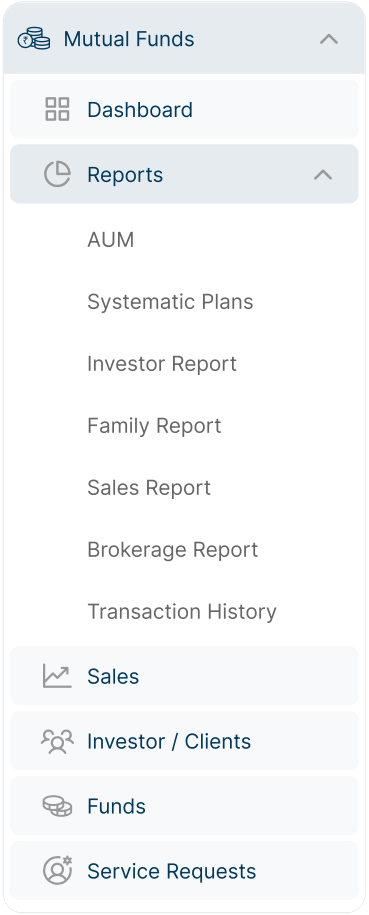
LAMF - Expanded



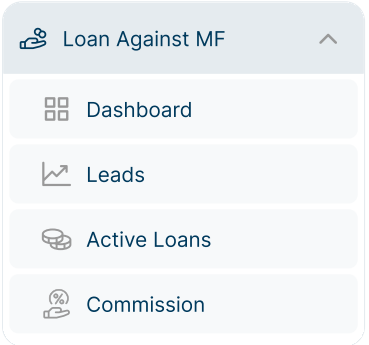
Customer Hamburger Menu



Mutual Fund - Expanded



LAMF - Expanded



Footer

compoundexpress

Compoundexpress Private Limited is a company incorporated under the provisions of Companies Act, 2013 and the rules thereunder, having its registered office at 121/22, Floor-11, Plot- 221/222, Mafatlal Centre, Vidhan Bhavan Marg, Nariman Point, Mumbai - 400021.

About Us

Privacy Policy

Terms of Service

Contact us
+91 9099922000
hello@compoundexpress.com

2023 compoundexpress @ All rights reserved

Desktop footer

compoundexpress

About Us

Privacy Policy

Terms of Service

Contact us

+91 9099922000

hello@compoundexpress.com

2024 compoundexpress @ All rights reserved

Compoundexpress Private Limited is a company incorporated under the provisions of Companies Act, 2013 and the rules thereunder, having its registered office at 121/22, Floor-11, Plot- 221/222, Mafatlal Centre, Vidhan Bhavan Marg, Nariman Point, Mumbai - 400021.

Mobile footer

Breadcrumbs

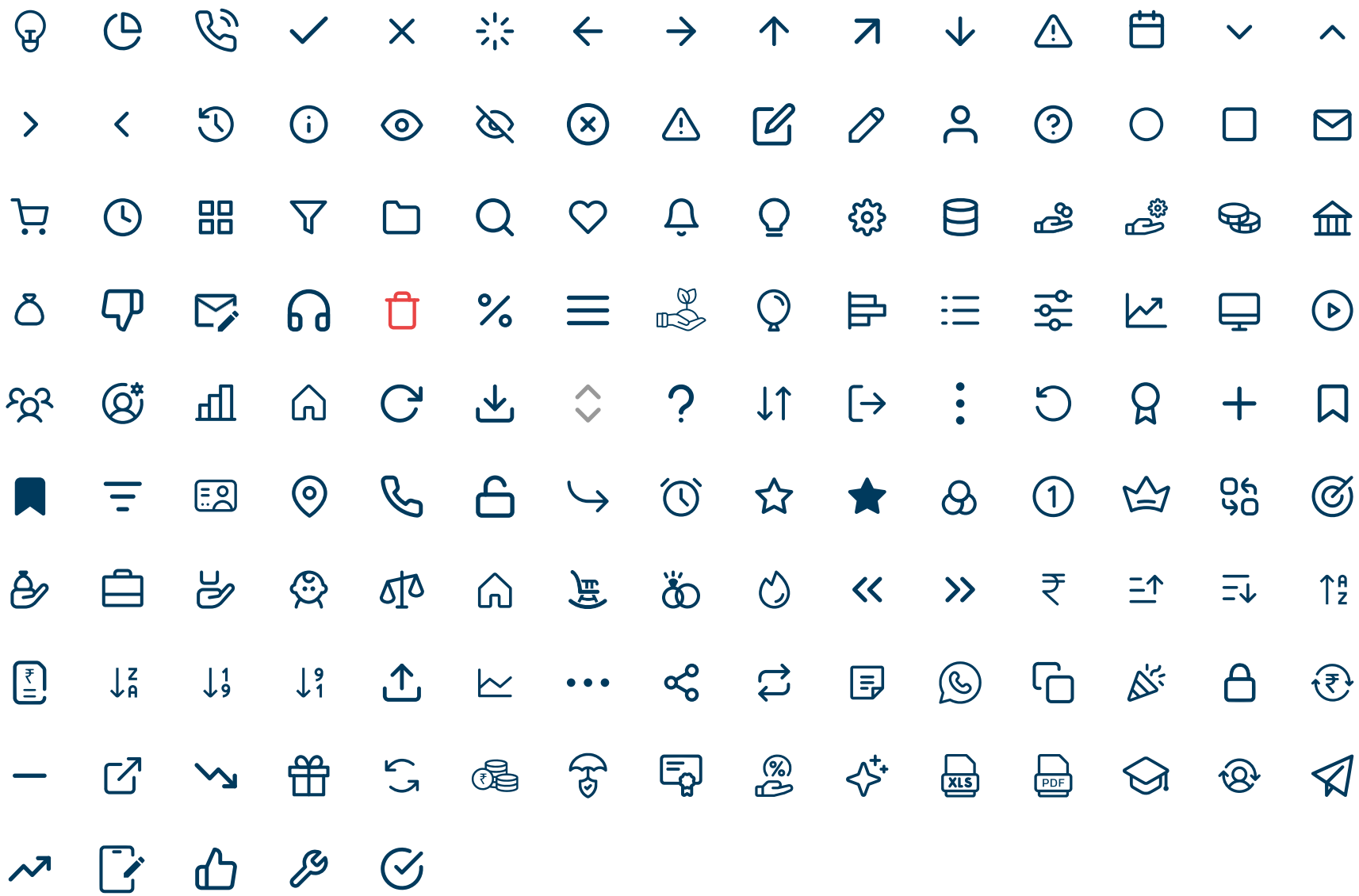
Desktop

Global Dashboard > Global Dashboard > Global Dashboard > Mutual Funds Dashboard

Mobile

Global Dashboard > Page 1 > Page 2

Icons



Alerts

Text with icon

If you notice any errors in the email or mobile number provided, please contact us immediately on support@compoundexpress.com

Information

Transaction Initiated **5 days ago**. Reshare the link with your client to complete the transaction.

Error message

Transaction Initiated **5 days ago**. Reshare the link with your client to complete the transaction.

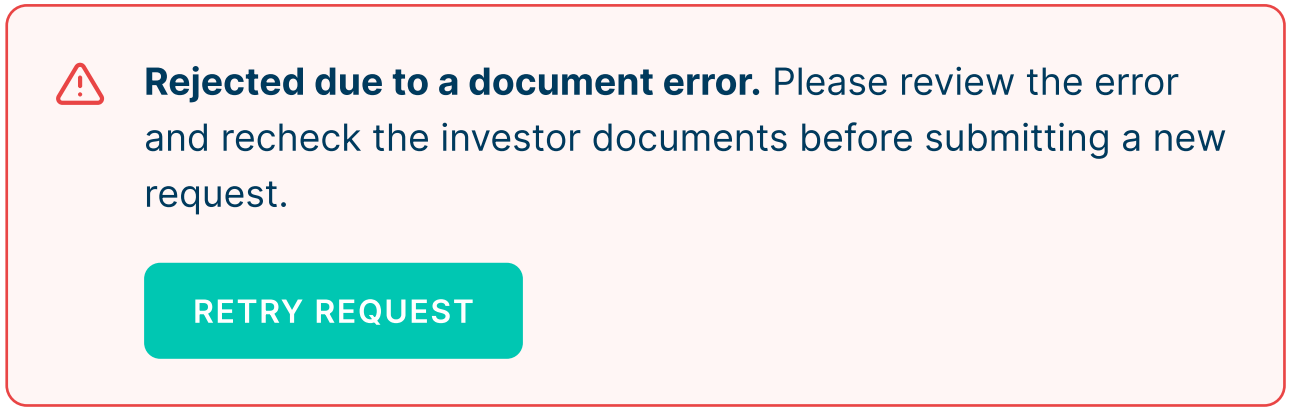
Warning message

Sticky top bar

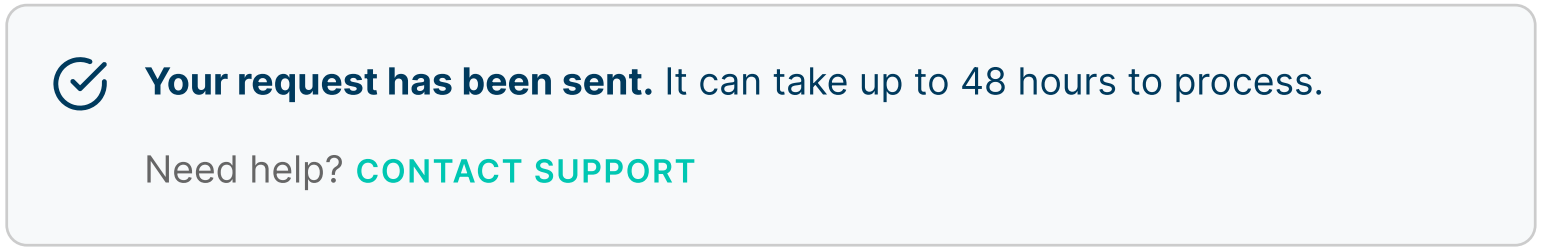
Your data may be incomplete. We need your consent to fetch your latest data from CAMS and KFin. FIX NOW

Error message

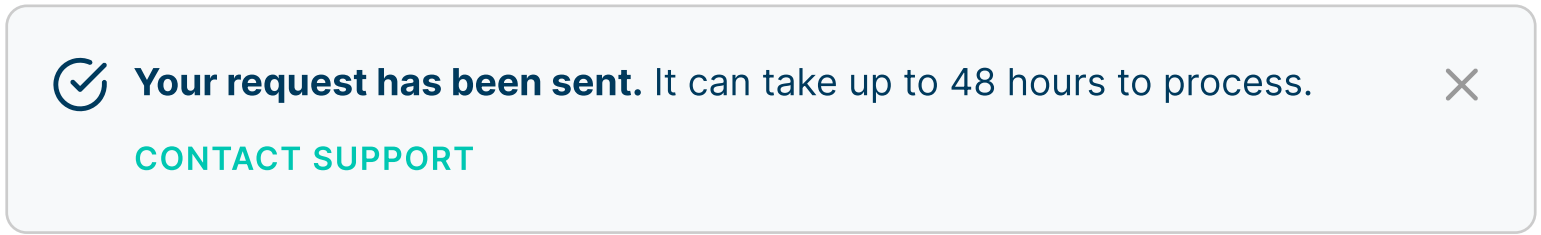
Text with action



Error message



Information



Watch list

Logo

Full Colour

Used for all forms of digital ans electronic media and on the web, as well as desktop printing: any kind of 4-colour print materials.



One-colour Negative

The one-colour negative logo may be used on dark backgrounds– 100% to 60% tint and photographic backgrounds that create enough contrast for the logo to stand out.



One-colour Positive

Used primarily for limited colour jobs when the full colour signature cannot be achieved.



Negative Colour

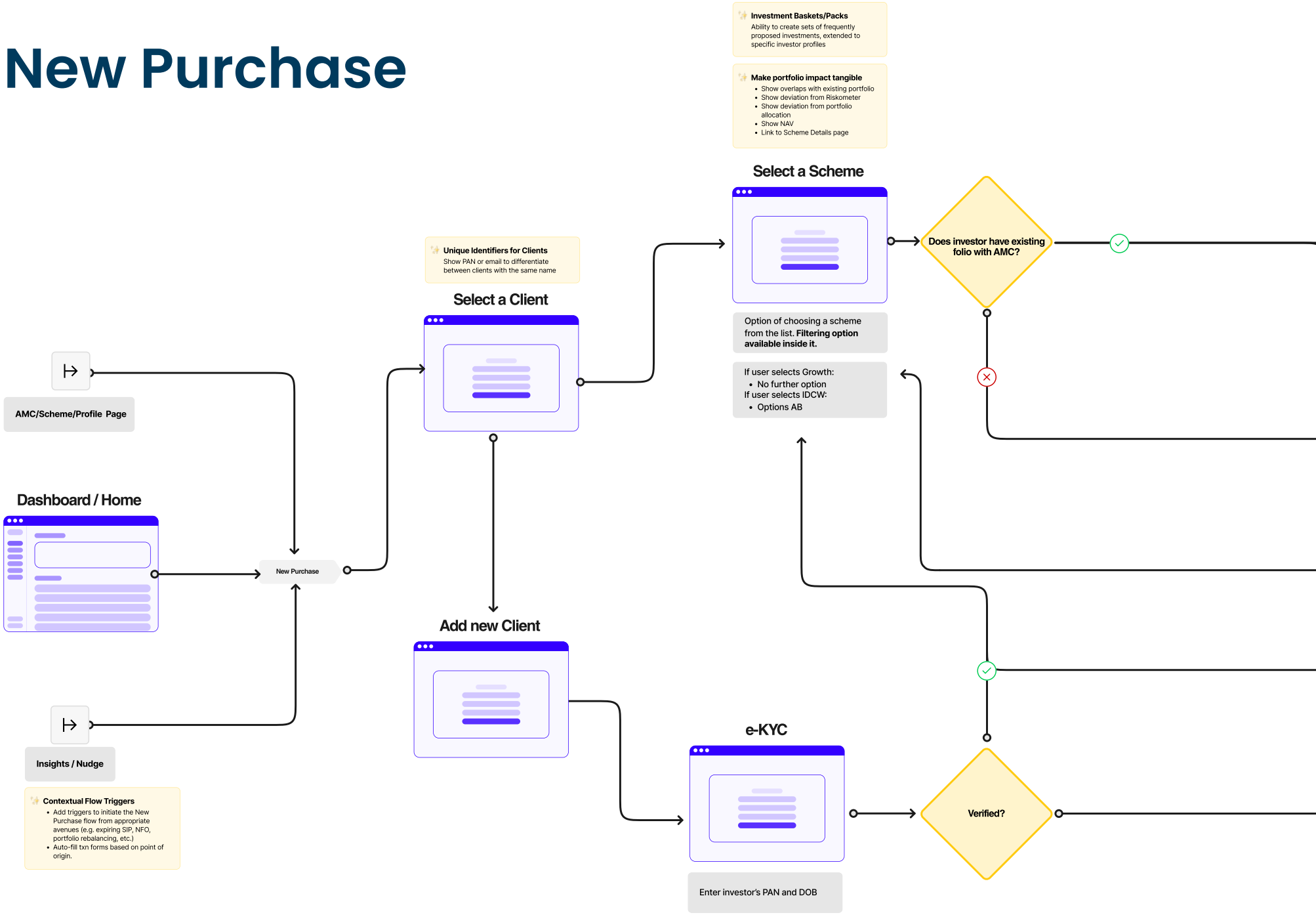
Used sparingly, should be; only for limited use where the logo is needed in a simplified and subtle way. Do not use the black and white logo for any print jobs where colour is available.

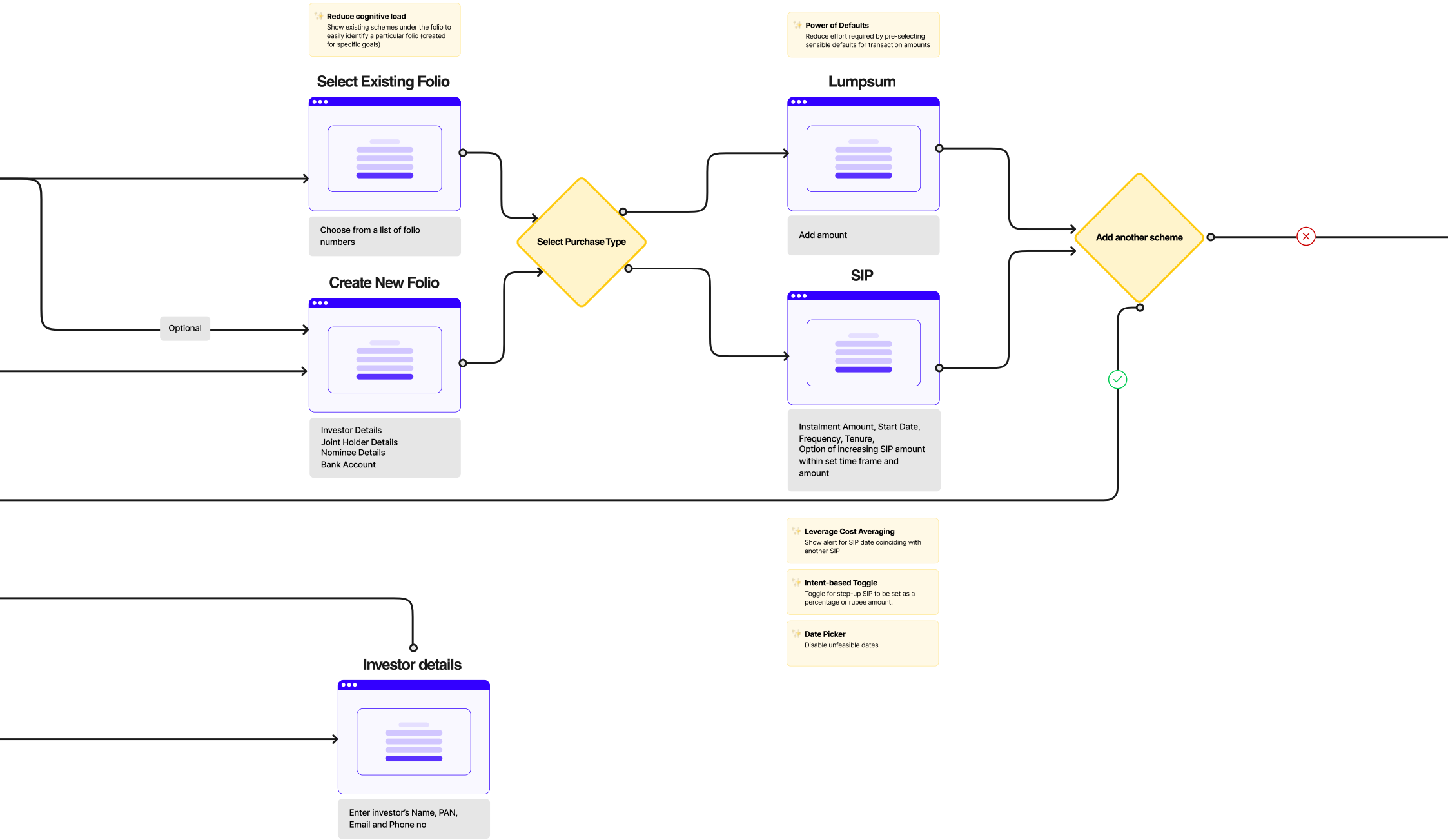


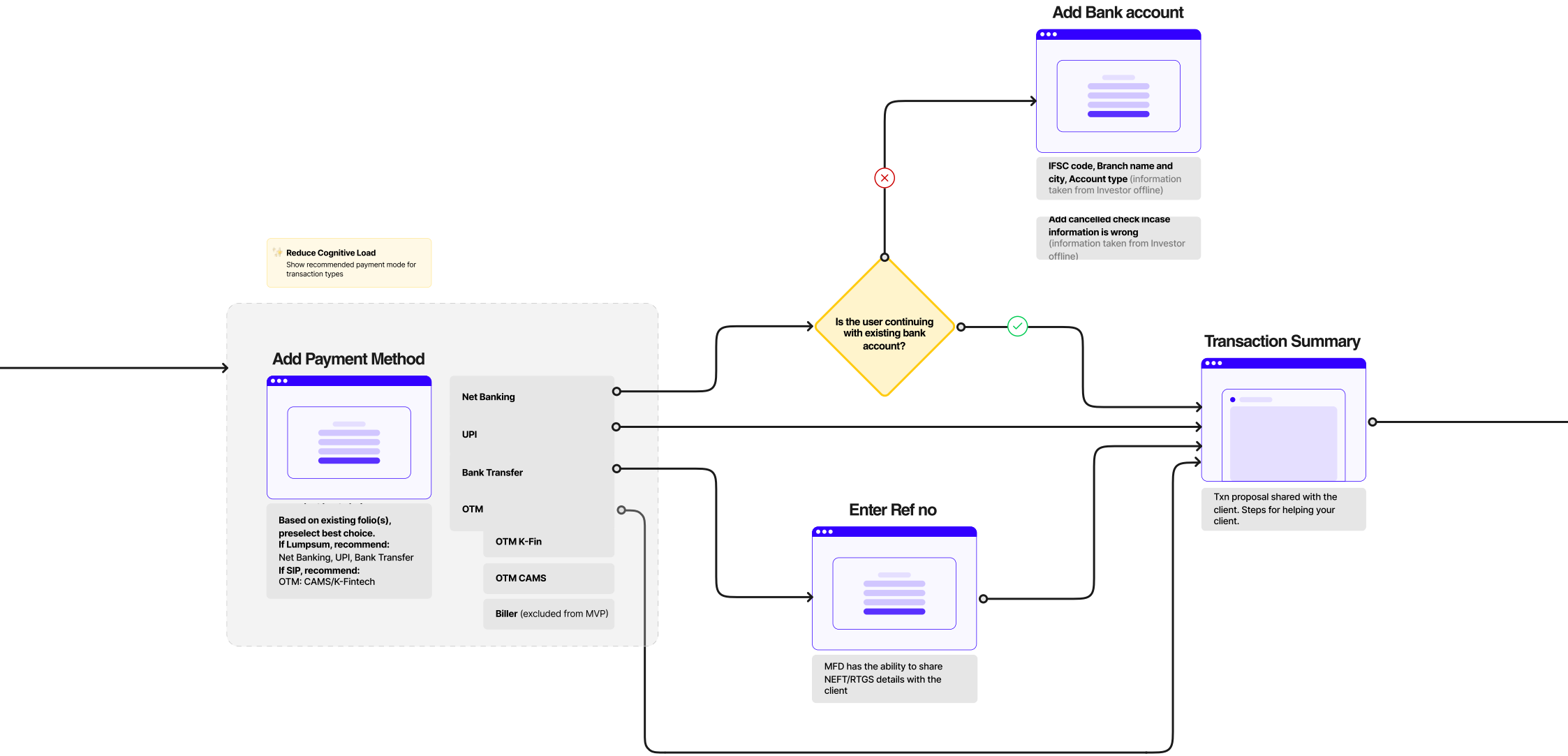
User Flow

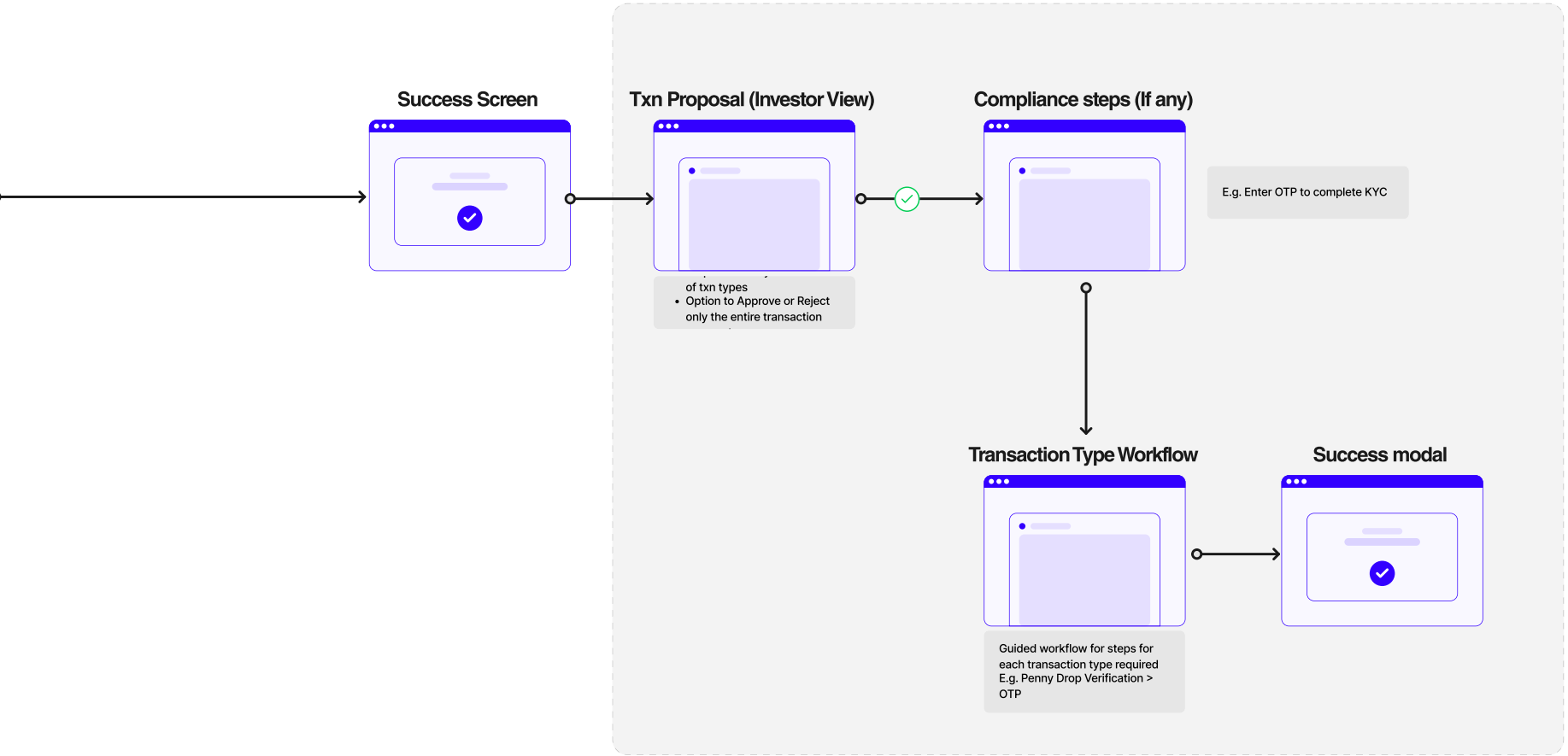
A user flow is a roadmap for your product. It visually maps out the steps a user takes to complete a specific task, from start to finish. This helps designers understand how users navigate the product and identify any potential roadblocks for a smooth experience.

New Purchase

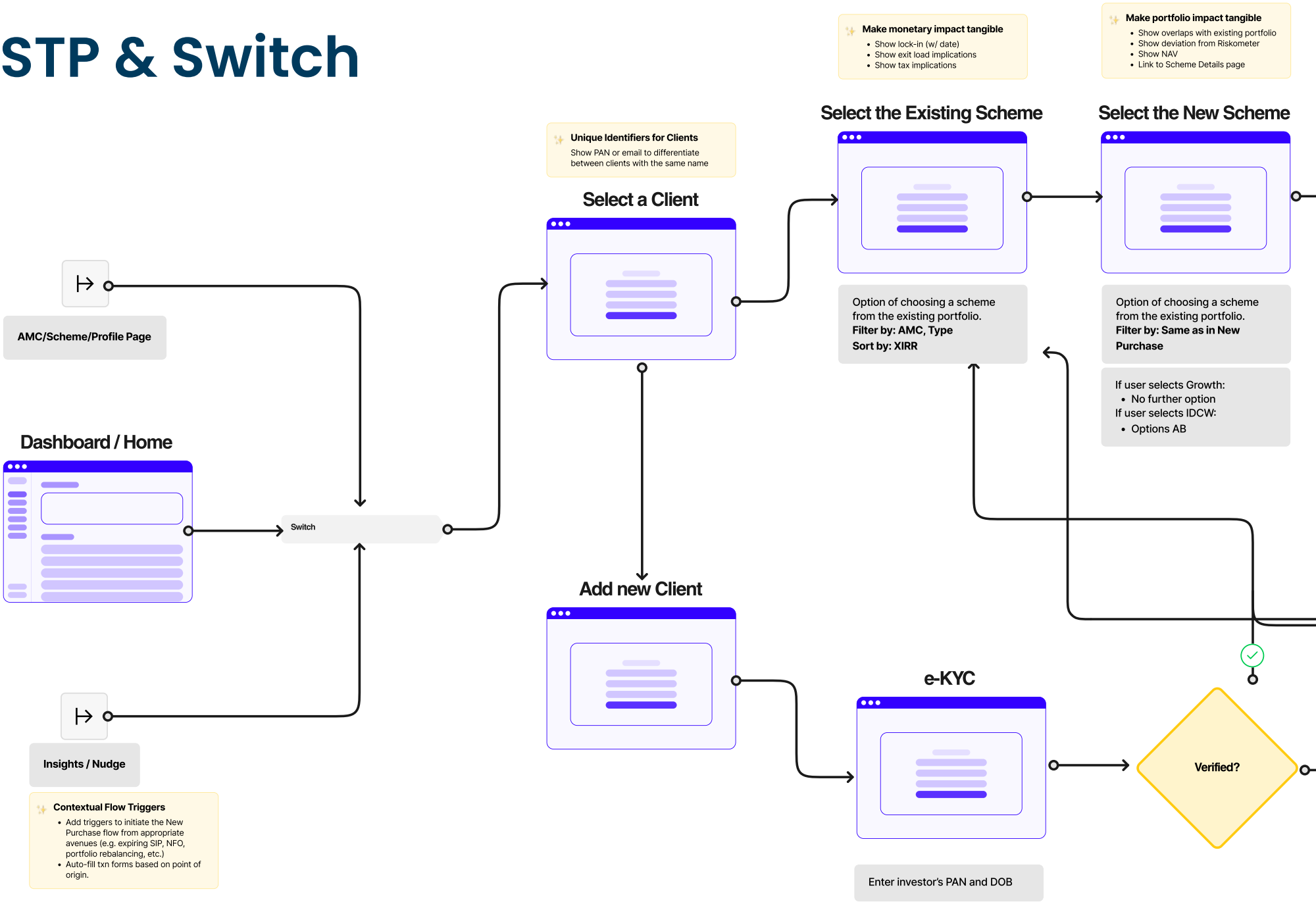


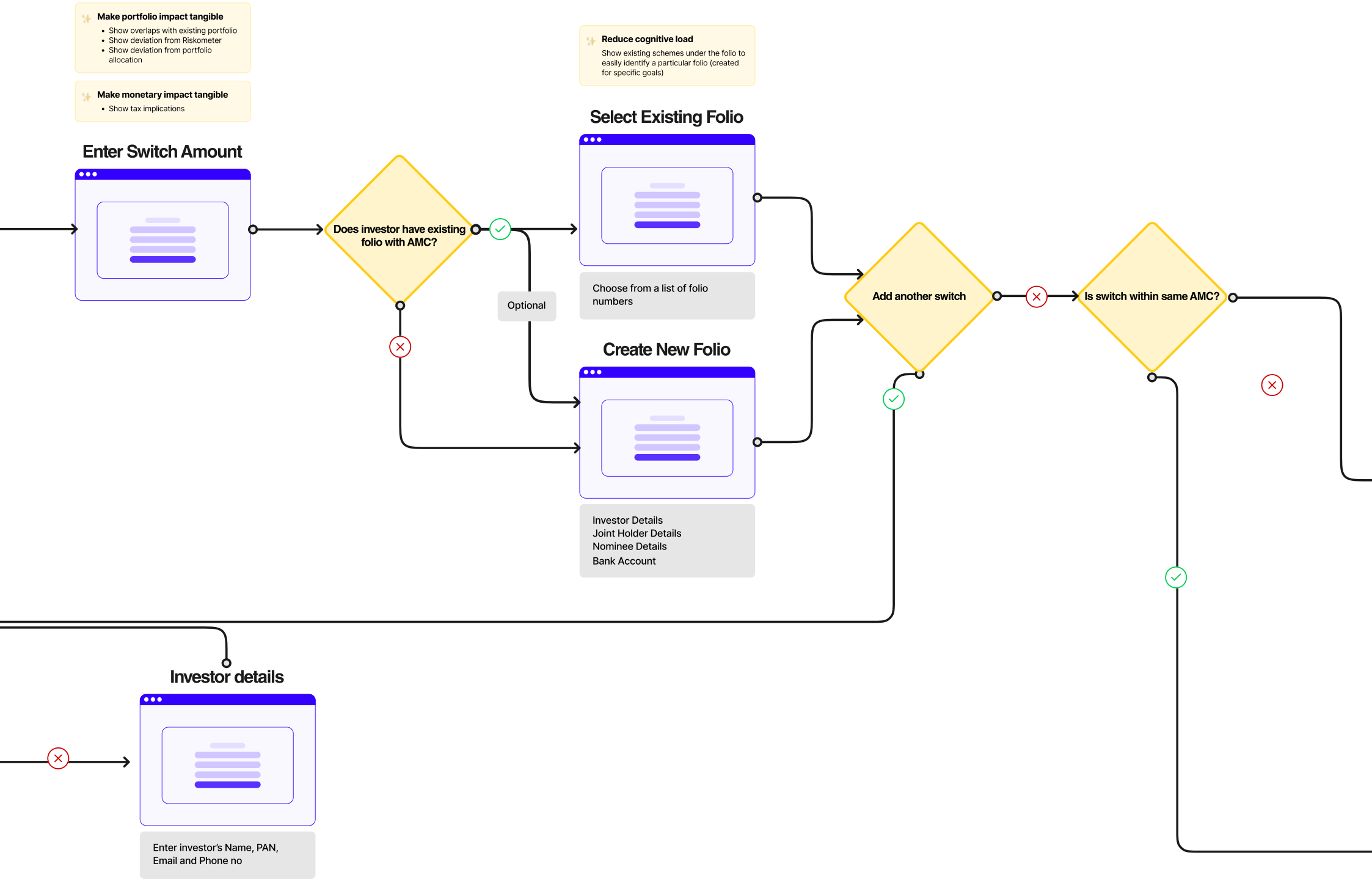

Reduce cognitive load
Show existing schemes under the folio to easily identify a particular folio (created for specific goals)
Power of Defaults
Reduce effort required by pre-selecting sensible defaults for transaction amounts
Select Existing Folio
Lumpsum
Choose from a list of folio numbers
Add amount
Select Purchase Type
Add another scheme
Create New Folio
SIP
Optional
Investor Details
Joint Holder Details
Nominee Details
Bank Account
Instalment Amount, Start Date, Frequency, Tenure,
Option of increasing SIP amount within set time frame and amount
Leverage Cost Averaging
Show alert for SIP date coinciding with another SIP
Intent-based Toggle
Toggle for step-up SIP to be set as a percentage or rupee amount.
Date Picker
Disable unfeasible dates
Investor details
Enter investor's Name, PAN, Email and Phone no

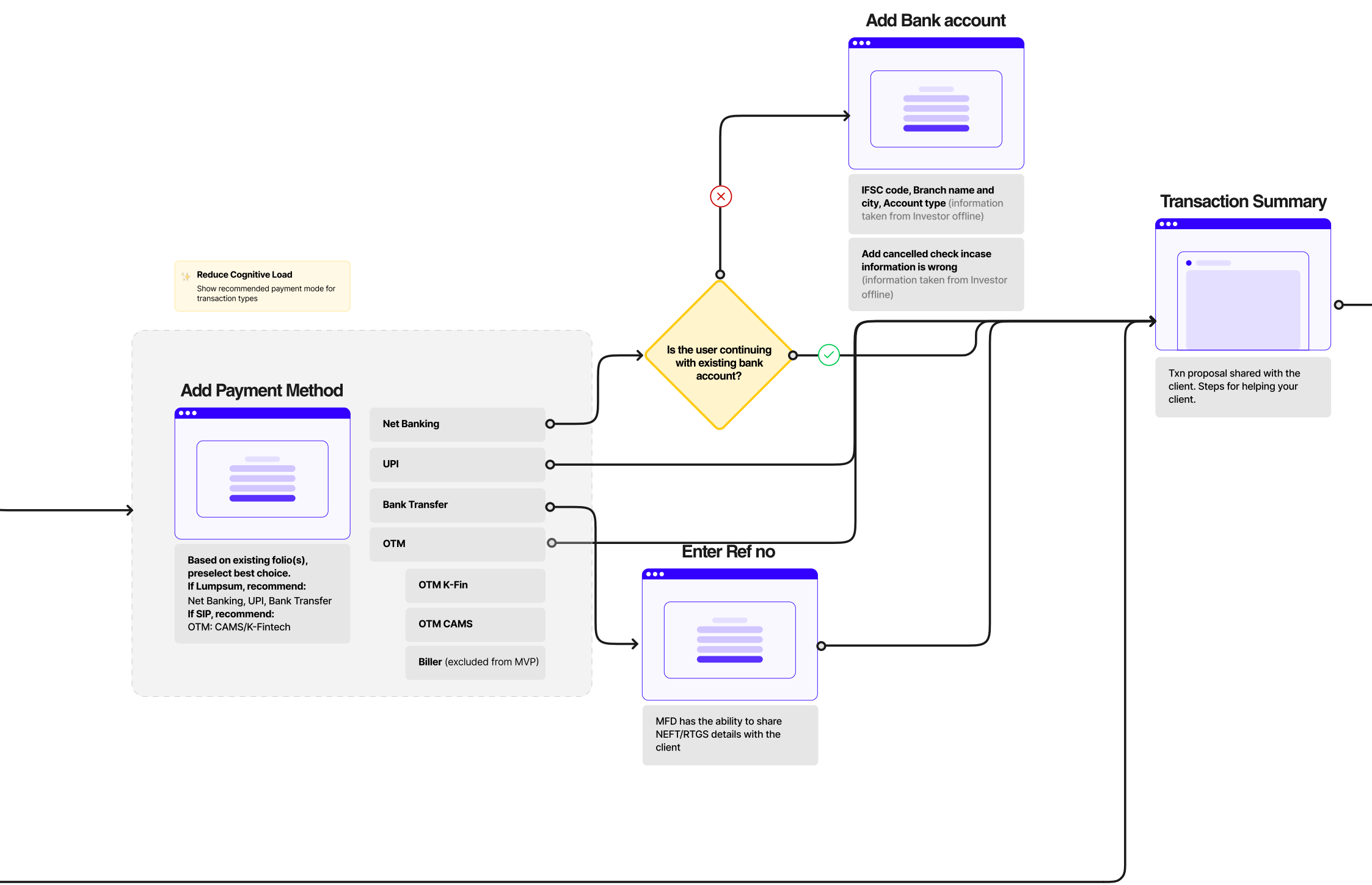

Add Bank account
IFSC code, Branch name and city, Account type (information taken from Investor offline)
Add cancelled check incase information is wrong (information taken from Investor offline)
Reduce Cognitive Load
Show recommended payment mode for transaction types
Is the user continuing with existing bank account?
Transaction Summary
Add Payment Method
Net Banking
UPI
Bank Transfer
OTM
OTM K-Fin
OTM CAMS
Biller (excluded from MVP)
Based on existing folio(s), preselect best choice.
If Lumpsum, recommend:
Net Banking, UPI, Bank Transfer
If SIP, recommend:
OTM: CAMS/K-Fintech
Enter Ref no
MFD has the ability to share NEFT/RTGS details with the client
Txn proposal shared with the client. Steps for helping your client.

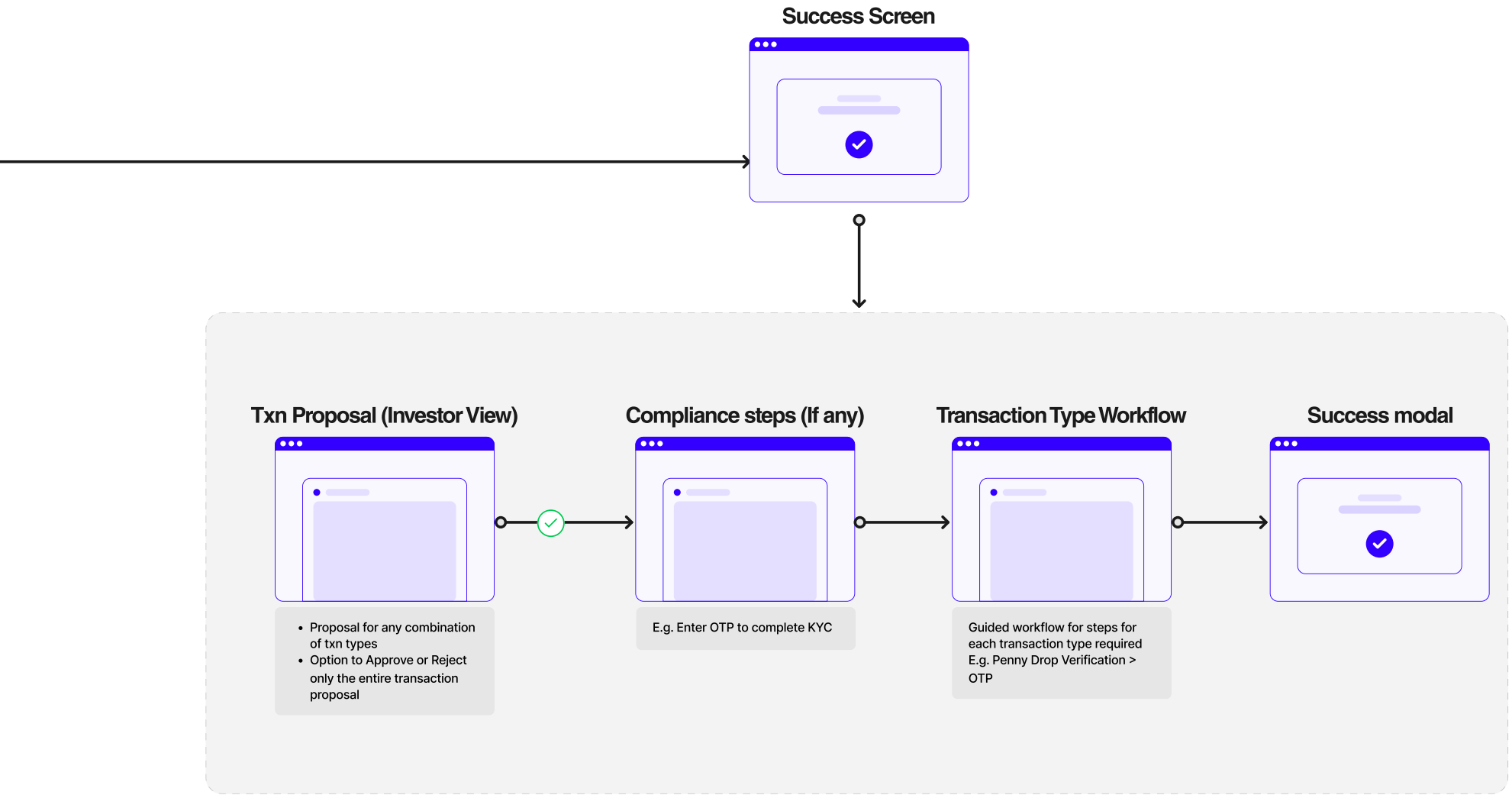

Success Screen
Txn Proposal (Investor View)
Compliance steps (If any)
E.g. Enter OTP to complete KYC
of txn types
Option to Approve or Reject only the entire transaction
Transaction Type Workflow
Success modal
Guided workflow for steps for each transaction type required
E.g. Penny Drop Verification > OTP

STP & Switch

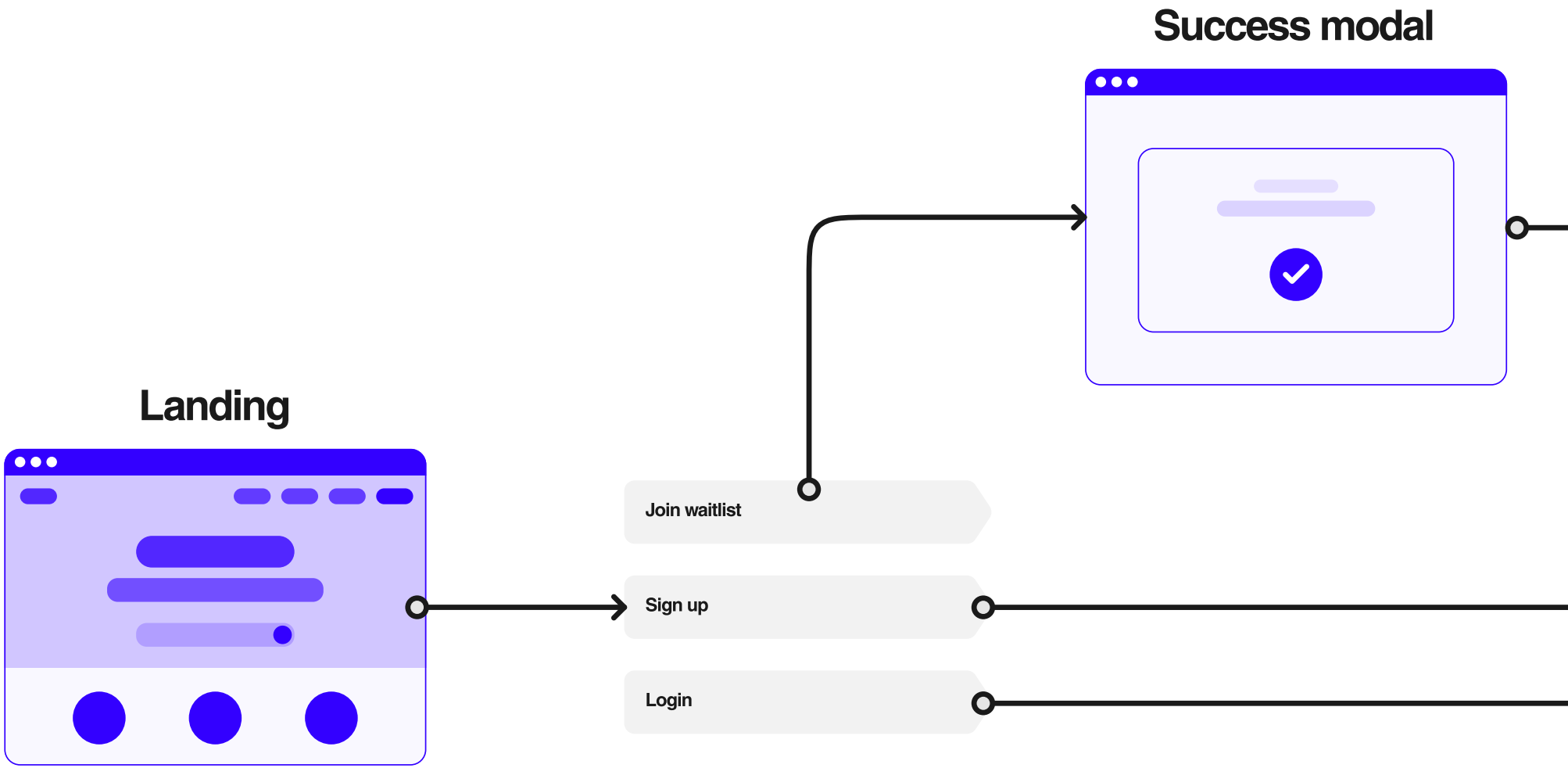

Make monetary impact tangible
Show lock-in (w/ date)
Show exit load implications
Show tax implications
Make portfolio impact tangible
Show overlaps with existing portfolio
Show deviation from Riskometer
Show NAV
Link to Scheme Details page
Select the Existing Scheme
Select the New Scheme
Unique Identifiers for Clients
Show PAN or email to differentiate between clients with the same name
Select a Client
AMC/Scheme/Profile Page
Option of choosing a scheme from the existing portfolio.
Filter by: AMC, Type
Sort by: XIRR
Option of choosing a scheme from the existing portfolio.
Filter by: Same as in New Purchase
If user selects Growth:
No further option
If user selects IDCW:
Options AB
Dashboard / Home
Switch
Add new Client
e-KYC
Verified?
Insights / Nudge
Contextual Flow Triggers
Add triggers to initiate the New Purchase flow from appropriate avenues (e.g. expiring SIP, NFO, portfolio rebalancing, etc.)
Auto-fill txn forms based on point of origin.
Enter investor's PAN and DOB


Make portfolio impact tangible
Show overlaps with existing portfolio
Show deviation from Riskometer
Show deviation from portfolio allocation
Make monetary impact tangible
Show tax implications
Reduce cognitive load
Show existing schemes under the folio to easily identify a particular folio (created for specific goals)
Enter Switch Amount
Does investor have existing folio with AMC?
Optional
Select Existing Folio
Choose from a list of folio numbers
Create New Folio
Investor Details
Joint Holder Details
Nominee Details
Bank Account
Add another switch
Is switch within same AMC?
Investor details
Enter investor's Name, PAN, Email and Phone no

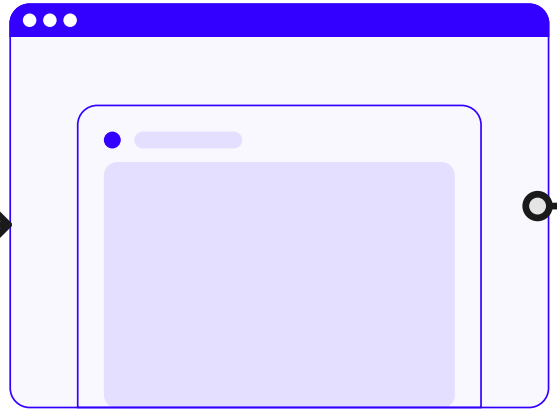

Add Bank account
IFSC code, Branch name and city, Account type (information taken from Investor offline)
Add cancelled check incase information is wrong (information taken from Investor offline)
Transaction Summary
Txn proposal shared with the client. Steps for helping your client.
Reduce Cognitive Load
Show recommended payment mode for transaction types
Is the user continuing with existing bank account?
Add Payment Method
Net Banking
UPI
Bank Transfer
OTM
OTM K-Fin
OTM CAMS
Biller (excluded from MVP)
Based on existing folio(s), preselect best choice.
If Lumpsum, recommend:
Net Banking, UPI, Bank Transfer
If SIP, recommend:
OTM: CAMS/K-Fintech
Enter Ref no
MFD has the ability to share NEFT/RTGS details with the client


Success Screen
Txn Proposal (Investor View)
Compliance steps (If any)
Transaction Type Workflow
Success modal
• Proposal for any combination of txn types
• Option to Approve or Reject only the entire transaction proposal
E.g. Enter OTP to complete KYC
Guided workflow for steps for each transaction type required
E.g. Penny Drop Verification > OTP

Onboarding



Onboarding email



Received a few days later with instructions to create profile

Create profile (Customise Experience)

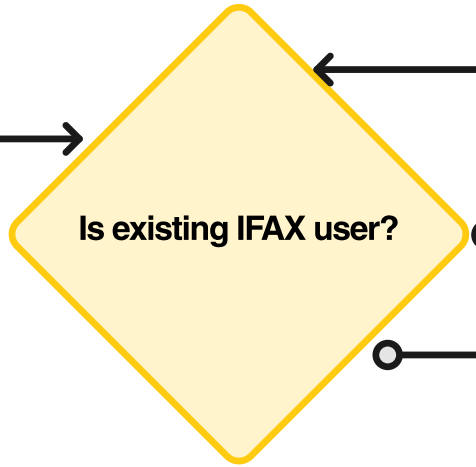


Collect required information to enhance experience

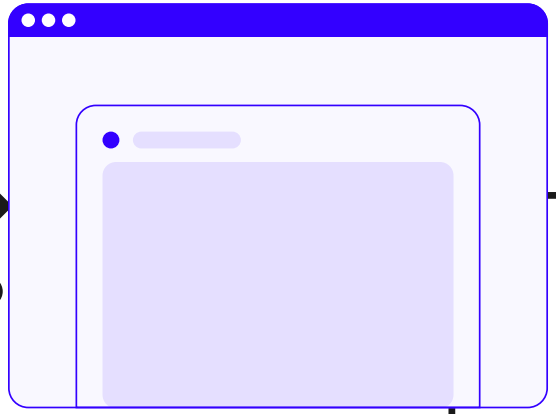
Sign in (Enter ARN)



Only input required is ARN Code
Implicit fetch consent



Activation email



As soon as we can meet the essential needs of the organization

Set a new password



Acknowledge existing IFAX user, reassure data migration

Verify OTP



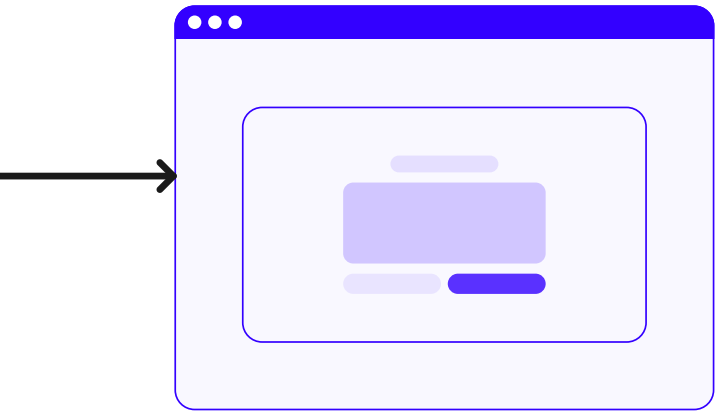
Communicate why the OTP is required (security, compliance, etc.)

Enter PAN, AMFI Details



Attempt prefetch based on ARN, implicit signup consent

T&C



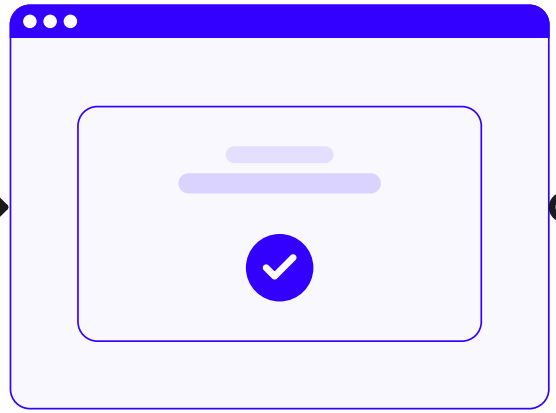
Accept button enabled on scrolling to the bottom of the page

Customise Experience

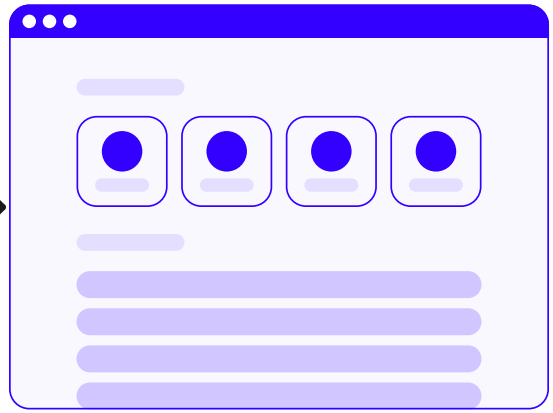


Ask the user to tell us more about themselves while they “wait” for the data to migrate/ fetch

Dashboard Welcome



Portal



Assume that by this point, users are registered. Otherwise, attempting to execute an action would trigger the sign in modal.