

— DIGITAL EMPLOYEES FOR FINANCIAL FIRMS

Hire AI agents that *work for your team.*

Meet **Samriddhi**, from WealthWisers AI Labs: digital analysts that read client portfolios and turn them into client-ready decisions in minutes, not hours. The agents do the analytical grunt work; your people keep the relationship and the judgment.

● Decision support for both sides of the market. The advisor stays the advisor.

— WHAT "DIGITAL EMPLOYEES" MEANS

Digital employees. Human decisions.

THE AGENTS DO

The analytical grunt work.

- ✓ Read statements and holdings **directly, no manual data entry.**
- ✓ Build the full portfolio picture and run the diagnostics.
- ✓ Surface what moved and what needs a look, each with its reason.

YOUR PEOPLE KEEP

The relationship and the judgment.

- ✓ The client relationship, the conversation, and the trust.
- ✓ The judgment about what a finding means for **this** client.
- ✓ The final call. Decision support, never advice.

— DIRECT ECAS PROCESSING

Onboarding that took hours now takes minutes.

Upload a client's or a prospect's eCAS statement. Samriddhi's agents read it directly and build the portfolio picture for you. A capability you can use today.

01

Upload the eCAS

One consolidated statement for a client or a prospect. Nothing reformatted by hand.

02

Agents read it directly

Holdings, instruments, and exposures parsed and structured into one picture, automatically.

03

A decision-ready read

Per-holding diagnostics with the reason behind each call, ready for your judgment.

SELL-SIDE

Advisors & MFDs: faster onboarding and quarterly reviews.

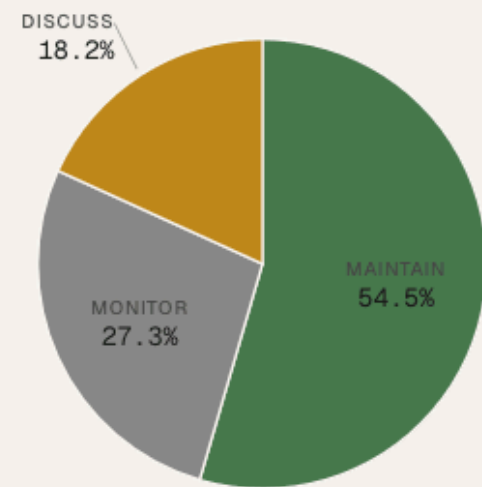
BUY-SIDE

PMS, AIF & risk: instrument and holdings analysis to interrogate.

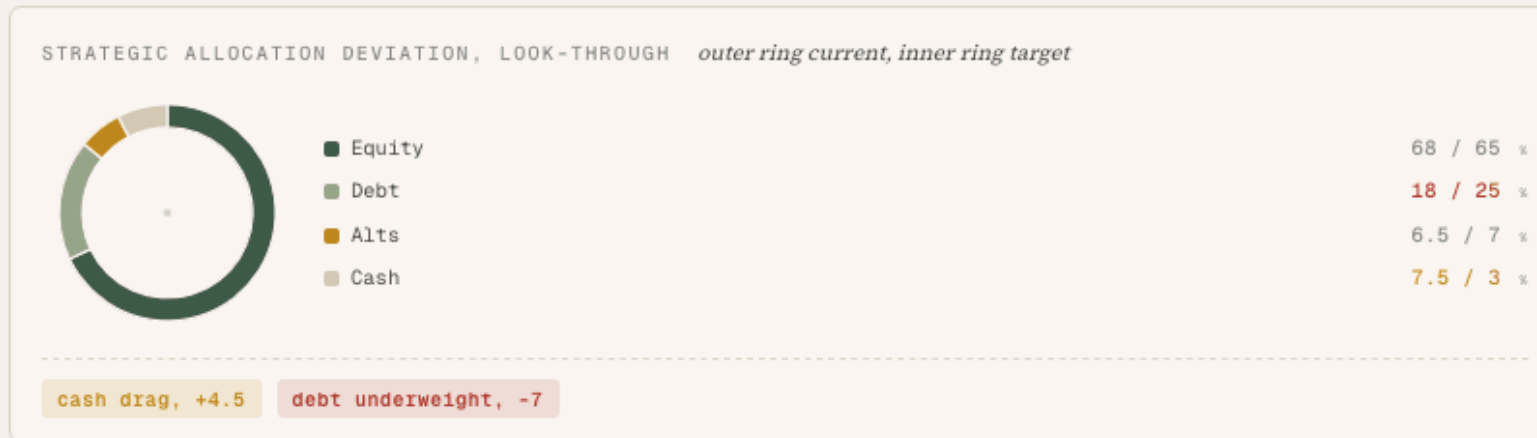
What your team sees

ILLUSTRATIVE SAMPLE CASE

● ● ● Samriddhi / Cases / Rajiv Surana, Q2 Review Prep



0% Review, no holdings flagged for exit.



MAINTAIN *Continue to hold.* 6 holdings

- **Axis Bluechip** 3.80 Cr
Style consistency intact; large-cap sleeve anchor. 14.3%
- **Kotak Emerging Equity** 3.00 Cr
Mid-cap exposure performing; manager continuity confirmed. 11.3%
- **Vanguard S&P 500 ETF** 3.00 Cr
International equity sleeve via GIFT route; allocation aligned. 11.3%
- **White Oak Pioneers PMS** 3.00 Cr
Quarterly letter discipline holding; deputy PM continuity since 2022 review. 11.3%
- **SBI Small Cap** 2.20 Cr
Small-cap sleeve standalone; manager track intact. 8.3%
- **Physical Gold** 2.00 Cr
Hedge sleeve; allocation aligned with Aggressive-with-hedge profile. 7.5%

MONITOR *Reassess at next review.* 3 holdings

- Parag Parikh Flexi Cap** 4.00 Cr

Four quarters of benchmark underperformance; investor-flagged in Q1. Rebalance decided; hold remainder.

15.1%

MONITOR

Hold through Q3 given the flexi mandate's long-thesis hedge role; if the benchmark gap persists past Q3, this becomes a Discuss item.
- HDFC Bank** 2.00 Cr

Held since 2024; underwater versus large-cap MF alternative. Hold and

7.5%

MONITOR

Recommendation not surfaced; no client-specific context distinguishes this from the standard Monitor framing. Use general



— SECURE, ISOLATED DEPLOYMENT

One secure environment. Yours alone.



ISOLATION

Your firm's own deployment.

Samriddhi runs as **one secure cloud environment for your firm alone**. Your data never leaves it and never mixes with anyone else's. Zero pooling, zero leakage.



SANITISATION

PII protected before the AI sees it.

A **proprietary sanitisation engine** strips and protects PII in line with DPDP, before the agents ever process what they do not need to see.



Together: **your data stays yours**, and within that, **PII is sanitised**. The deployment and the agents are tuned to your firm, not a one-size-fits-all SaaS.

— READY, NOT SCRAMBLING

As the rules on AI tighten, you are already aligned.

✓ DPDP BY DESIGN

Privacy built in, not bolted on.

Because PII is sanitised before processing and your data stays in your own environment, **DPDP alignment follows from how the system is built**, not from a policy added later.

✓ SEBI READINESS

Ahead of the AI disclosure curve.

As SEBI moves on AI usage disclosure, firms on Samriddhi are positioned to be **ready rather than scrambling**.

SEBI, Consultation Paper on guidelines for responsible usage of AI/ML in Indian Securities Markets, 20 June 2025.

— OPEN SOURCE, BUILT WITH IMT CFM

Built in the open, so a firm can verify what it does.

Samriddhi is an open-source project, built in partnership with the Centre for Financial Markets at IMT Ghaziabad. Open source brings academic rigour to the work, and it means you can verify what the system actually does, rather than take our word for it.



— WE TAKE ON ONE TO THREE FIRMS AT A TIME

Bring Samriddhi into your firm.

A small number of engagements keeps every deployment considered and the attention real. Talk to us about a walkthrough with your own client book; we will tell you honestly whether we are a fit.

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- Software for advisers; not investment advice. The adviser stays the adviser.