



Press Release

HDFC Securities launches HDFC Money, a robo-advisory platform for all Mutual Funds Investment.

HDFC Money - a hassle-free, paperless, Robo Advisory investment model that takes care of Mutual Funds and other financial products without the need of a Demat Account.

Mumbai: 24 May 2022: Intending to facilitate mutual funds investment and a host of other financial services, HDFC Securities has added yet another feather to its list of initiatives. HDFC Money is a 100% digital platform that doesn't involve opening/having a Demat Account. Apart from Mutual Funds, one can also manage other aspects of finances such as accessing, managing, and tracking portfolios, starting goal planning, insurance planning, creating E-wills, and managing/filing taxes.

Emphasising the benefits of using HDFC Money to invest in Mutual Funds, **Mr. Abhishek Mehrotra CFA, Head of Investment Products, HDFC Securities** said, "Goal based Investing is something one can't overlook, the basic objective of investing is to achieve a financial goal, which could be as simple as holiday trip to a complex retirement planning or child education / marriage. As one of the top brokerage firms in India, we have a responsibility towards our customers. The Assets Under Management (AUM) of the Indian Mutual Fund Industry has grown from Rs. 6.82 trillion as of November 30, 2011, to Rs .38.89 trillion as of April 30, 2022, which is a more than fivefold increase in 10 years. **HDFC Money**, backed by inputs from a highly experienced team, curates via Robo Advisory the best of the best Mutual Funds that exist in this exhaustive market as per the declared risk profile of the customer. These eventually help the investor in navigating through their investment decisions. After all, there's a huge difference between a planned investment which has defined objective than random investing."

Why HDFC Money?

Goal based investment is the need of the hour, there are plethora of investors who approach long term investment without having a proper plan in place. HDFC Money Robo advisory will help investors to plan & execute with a more defined objective keeping risk and tenure in consideration. It starts with customer identifying and specifying his/her goal and the expected outcome over certain time frame with a defined risk appetite. The plan further takes into consideration the mode of investment ie lumpsum or staggered or a combination over the period to achieve the desired goal.

Long term goals are predefined as Child Education / Marriage, dream home, retirement or simple a desired figure in mind that one wants to achieve eg 5Cr in 20yrs from now. Simple bucketing like goal to

get a monthly cash-flow from investments or funds for emergency are also created for investors to help in his/her objective.

Robo-advisory analysis the input and places recommendation of the schemes must suitable as per the risk profile and time horizon. It also has funds filtration basis risk & return, trending funds & New fund offers available all over few clicks.

Customers are on-boarded by completing basic KYC documentation digitally and the platform charges NIL account opening or maintenance charges.

Once view portfolio, a detailed report at transaction level, Profit & Loss report and Capital gain help a customer to keep a track of all the investment. We plan to share monthly portfolio performance report to update a customer on the overall portfolio performance.

Research & Insights One can track funds of their choice and get comprehensive reports about the fund performance history, fund manager and other information as last disclosed Asset allocation, top sector and stock holding. This information helps to make informed investment decisions

E-will A facility that saves the trouble of running after multiple lawyers to create a will about the distribution of wealth and other assets. Starting as low as Rs. 1,500, all it takes is a few minutes with absolutely no paperwork at all. As for authenticity, it has been created by a team of the best legal experts.

E-Tax Tax returns can be filed conveniently through HDFC Money, either by self or through a CA. As per requirements, one can select any tax-related services ranging from Basic Self e-Filing, CA assisted e-Filing, CA assisted with Capital Gains, NRI Tax Returns, Tax Query to Tax Rectification/IT Notice.

HDFC Money, with its exclusivity in mutual funds investment, offers a range of options for investors depending on their preference and risk appetite.

About HDFC Securities

A subsidiary of HDFC Bank, HDFC Securities is a leading stock brokerage in India. With over 20 years of experience, the company serves more than 2 million retail and institutional investors through a suite of products and services.

HDFC securities offers over 30 investment vehicles, spanning asset classes such as stocks, gold, real estate and debt instruments. The company offers investment and direct trading services through buying and selling of equities, along with currency derivatives, mutual funds, NCDs, fixed deposits, bonds, and more, to suit the diverse investment needs of Indians. With a robust understanding of the personal finance space in India, HDFC Securities specializes in asset allocation, portfolio structuring and realignment, and goal-based investing for customer success.

Committed to providing seamless trading experiences, HDFC Securities offers the latest technology tools and future-ready trading platforms (including mobile application, website, ITS and Proterminal) to investors and traders who can access state of the art features to experience a seamless transactional journey, driving more value out of their portfolios.

The company maintains a strong social media presence through which it periodically publishes market updates and capital markets literacy literature. The company is one of the most followed accounts on Facebook, Twitter, Instagram and Youtube, providing investment and broking services in the financial domain in India.

Link - <https://www.hdfcsec.com/>

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