

NEWSLETTER



Rupeeseed Technology Ventures Pvt Ltd

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Updates & Insights

By Sandeep Manoharan, CEO

Technology continues to redefine the capital markets ecosystem with seamless user experiences becoming key differentiators for growth. As brokers and wealth firms scale their businesses, the need for intelligent solutions that improve operational efficiency while enhancing customer engagement has never been greater.

Keeping this vision in mind, we are pleased to introduce two significant product enhancements. The first enables users to add scrips directly to existing baskets from the Order Form, making basket management faster, more intuitive, and operationally efficient. The second is our new Prospect Journey Recovery solution, designed to address one of the biggest challenges in digital onboarding—prospects abandoning the process midway. By identifying these drop-offs and enabling timely re-engagement, businesses can recover potential clients, improve conversion rates, and minimize revenue loss.

Innovation remains at the core of everything we build. We will continue to develop technology-driven solutions that simplify complex processes, empower our partners to grow with confidence, and create greater value across the capital markets ecosystem.

More details ahead in this newsletter.

NEWSLETTER HIGHLIGHTS

► Trading

Product Level Enhancement

- Add Scrips to Existing Baskets from the Order Form

► Onboarding

New Product Update

- Prospect Flow CRM

Product Level Enhancement

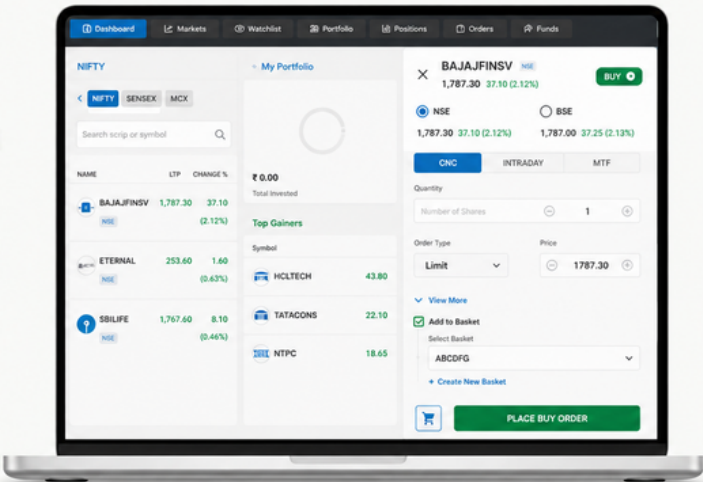
Trading

ADD SCRIPS TO EXISTING BASKETS FROM THE ORDER FORM

You can now add scrips to your existing baskets directly from the order entry form while placing BUY or SELL orders. Simply search for a scrip through the watchlist or global search, select BUY or SELL, and enter the required quantity, product type, and price details. Before submitting the order, you can choose an existing basket and add the scrip with the same order parameters. This enhancement eliminates the need to manage baskets separately and makes trading more seamless. With this update, organizing and executing your investment strategies becomes faster and more convenient.

Smarter Trading,
Right from the Order Form

Add scripts to your existing baskets while placing BUY/SELL orders.



 Add to existing baskets from the order form itself!

KEY FEATURES



Direct Addition
Add scrips to existing baskets directly from the BUY/SELL order window.



Unified Workflow
Manage orders and baskets together.



Faster Execution
Eliminate extra steps and organize trades while placing orders.



Seamless Trading
Maintain your investment baskets effortlessly without interrupting the trading flow.

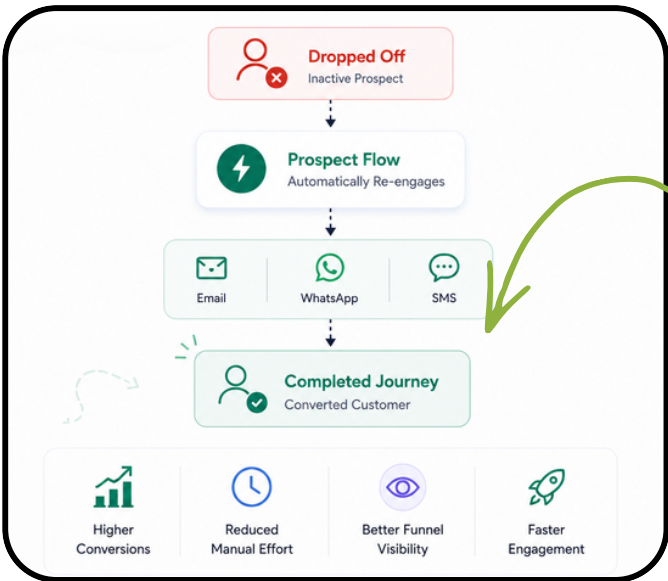
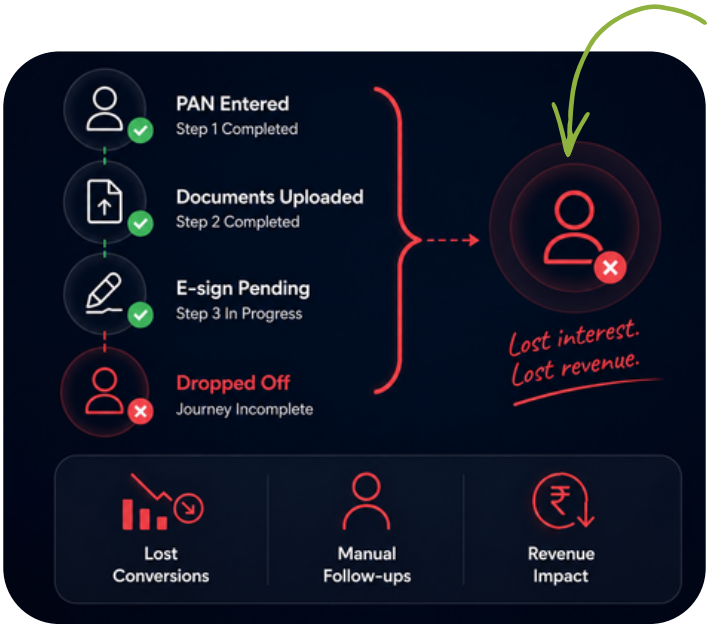
New Product Update

Onboarding

PROSPECT FLOW CRM™

PROSPECTS START. MANY NEVER FINISH.

A prospect begins the onboarding journey but leaves midway. These abandoned journeys create a leaky funnel, resulting in lost conversions and increased manual follow-ups. With limited visibility, opportunities often go unnoticed until it's too late. Every drop-off ultimately impacts growth and revenue.



COMPLETE DROPPED OFF JOURNEYS

Prospect Flow continuously monitors the onboarding journey and automatically re-engages inactive prospects through timely communication across Email, WhatsApp, and SMS. By guiding users back to resume their application from where they left off, it eliminates the need to re-enter previously submitted information. This helps businesses recover lost opportunities while delivering a faster, smoother, and more seamless onboarding experience.

Stay tuned for more updates ahead!!

