Product Note on

Chella Chat

A chatbot, mobile app for financial services



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# Statement of Confidentiality

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# Overview

Chella Chat is a chatbot based mobile app for financial services, developed by Chella Software private limited. This app allows investors transact/trade with their broker through chat based interactions/conversations. The app facilitates the investors with the below functions

* Buy and sell shares on NSE
* Manage their trading activities
* View their portfolio and various account details
* New customers can send a request to the broker to open a trading account

# How investors can use Chella chat

Chella chat allows investors to buy and sell shares through a chat based interface. The chatbot engine of Chella chat automates the process and interacts with the user using regular chat messages. In addition to trading, an investor can view holdings, check their order status, modify / cancel orders and carry out many account related functions. The activities that can be done through Chella chat are

## Request to open new trading account with preferred brokers.

Investors who do not have a trading account, can send a request to their chosen broker to open an account. The broker will get in touch with the client to complete the account opening processes.

## Trading

Chella chat allows investors to trade in real-time. Investors will be able to see the closing price of the security and place an order on the exchange. Chella chat connects with the broker back office and hence orders placed are routed to the exchange through the brokers BBO infrastructure. Investors can carry out the following

* Place a buy or a sell order for the selected stock
* Modify an existing order
* Cancel an existing order

## Statements and reports

Investors can view and self-manage their accounts through Chella chat. The following information can be viewed by the investors.

* Status of the orders placed.
* Portfolio valuation of the stocks held
* Mini Statement which displays the last five transactions done by the investor.
* View ledger balance and the available funds.
* Closing price of selected stocks
* Market status.

## Straight through processing of orders

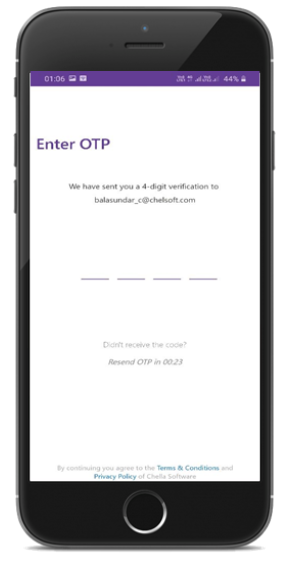
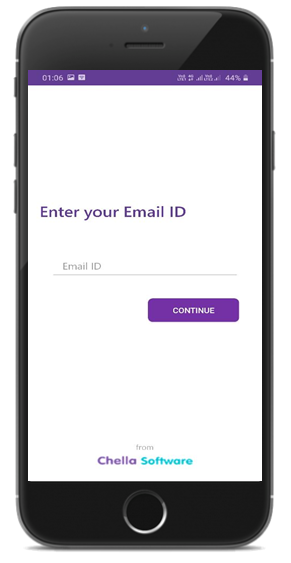
* Chella chat integrates with BBO through APIs. Any transaction done in Chella chat is reflected in ClearVision in real time and vice versa.
* All orders placed through Chella chat are risk checked in ClearVision, in real time, for necessary funds /stocks before being accepted. If the investor does not have adequate buying power or shares in the account, the order is rejected.

## Pilot phase will be on Android

* In the pilot phase, Chella chat will be available on Android
* The iOS version will be launched in a few weeks from now based on the traction that is seen with the Android app

# Images of Chella chat

**Login screens**

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| --- |
| **Home Screen** |
| **D:\Documents\Rhino\Final\Chella chat home.png**  **Broker Selection**  **D:\Documents\Rhino\Final\Broker selection.pngD:\Documents\Rhino\Final\Broker selection 2.png** |
| **Brokers welcome screen**  **D:\Documents\Rhino\Final\Broker welcome screen.png**  **New acount opening request**  **D:\Documents\Rhino\Final\New acc opening.png**  **Options for existing customers**  **D:\Documents\Rhino\Final\existing customer.png** |