



# Asset Drishti

April 2023

# About AssetDrishti

- **AssetDrishti is Perfios' self-service portal to enable financial institutions / regulated entities (FIs / REs) to onboard themselves onto the account aggregator (AA) ecosystem**
- **The product features ability to self-register, select use case, get AA certified and fetch customer data**
- **The product address the needs of FIs / REs such as registered investment advisors, small NBFCs, insurance brokers and other entities that are looking to aggregate customers' financial data**
- **Use cases for data aggregation can be lending, financial planning, investment advisory, credit monitoring & more**
- **Data aggregation may be one time (e.g. for Lending) as well as periodic (e.g. for investment advisory)**

# How it Works - Step 1 - Register / Login



## Sign In

[Forgot Password?](#)


Login

[Don't have an account? Sign up here](#)



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# How it Works - Step 2 - Select Your Profile






assetdrishti

Financial Information User

Dashboard

Hi, Amandeep Singh

Request Go Live  



Registration

2

Choose purpose

3

Fetch customer data

Select Purpose


Investment Advisory

Fetch past 12 months financial assets data like bank statement, equity, mutual fund. Plus daily incremental data refresh.

Lending

Fetch past 6 months bank statements data for underwriting loans.

register custom purpose Save

Showing : Apr 27, 2023 - May 4, 2023 

### Consent Summary

Total consents initiated	Awaiting approval	Approved	Rejected
0	0	0	0
Revoked	Paused		
0	0		

### Data Summary



Data requests	Data received
0	0

This home page also provides a “Dashboard” view of all important business metrics related to data fetches

# How it Works - Step 3 - Fetch Data

Financial Information User

Hi, Amandeep Singh

Request Go Live  


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Transactions

Search Application No, Transaction ID, Mobile No, Email ID, AA Handle

May 3, 2023 - May 4, 2023

More Filters Refresh Customer Data + New Customer Data

Application / Reference No.	Transaction ID	Usecase ID	AA Handle / Email ID	DateTime	Status
322938yreiwD	052aace6-d922-4176-9cdf-c870aa9a112e	ASGG-1683188341 Aggregated Statement	9999644229@anumati aman@gmail.com	04/05/2023 13:49:17	 SUCCESS

Showing 1 - 1 of 1 items

Rows per page: 10 << < 1 > >>

Dashboard

Transactions

APIs

Settings

Fetch a new customer's / borrower's data or refresh the latest data of existing customers

# Benefits of AssetDrishti

- **Fully self-led with no need for a tech team or product implementation team**
- **Completely automated including AA certification, minimal setup needed**
- **Readymade profiles & configurations for various use cases such as lending, credit monitoring, investment advisory etc which can be optionally tailored**
- **Pay-as-you-go pricing model to give FIs maximum flexibility**