



# Digital Strategy for CSDs

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# Digital for Core Services

- Segregated accounts
  - Enables client access to view account & give instructions
- User Value Creation
  - Prefer participant apps in the context of trading
  - Independent view. Not all participants have good online apps. Some clients prefer offline trading.
  - Value added services
  - Stockbrokers have special needs. Important user segment.
- IDeAS: View access to holdings and transactions
  - View access to holdings and transactions
  - Simple online sign-on process. Mass product.
  - Web and mobile versions
  - Special features for broker pool accounts



# Digital for Instruction Execution

- **User Value Creation**
  - Large number of clients give POA to brokers.
  - Only small number of clients need digital instruction execution
  - Stockbrokers need to execute instructions on client accounts
  
- **SPEEDe: Instruction execution**
  - More authentication. Restriction on target accounts.
  - Digital signature for unrestricted operation. Used by stockbrokers.
  - Password access for retail clients. Broker can set up delivery instruction for client confirmation
  - Web version for stockbrokers. Mobile app for retail clients.
  
- **SPICe: POA instruction execution by stockbrokers**
  - Allows pull of securities into broker pool account from their clients
  - Can be used for delivery for transactions executed on stock exchange
  - Can be used for margin collateral



# Digital for E-Voting

- **User Value Creation**
  - Participate in shareholder meetings without physical presence
- **Remote e-voting**
  - 24x7 e-voting service for institutional and retail clients
  - Custodian proxy voting for institutional clients
  - Web and mobile versions
- **Venue e-voting**
  - E-voting at venue using tablet devices. PC-based voting stations also possible.
  - Live streaming of general meeting proceedings to shareholders not attending. Available to logged in shareholders. Can post questions.
- **Instantaneous results availability**
  - Combines remote e-voting and venue voting



# Challenges

- Organizational focus on backend services than frontend digital services
- Lack of UX design skills
- Lack of digital technological skills compared to backend application skills



**Thank you**