

Pakistan Stock Exchange

Increasing customers & business





Introduction

01

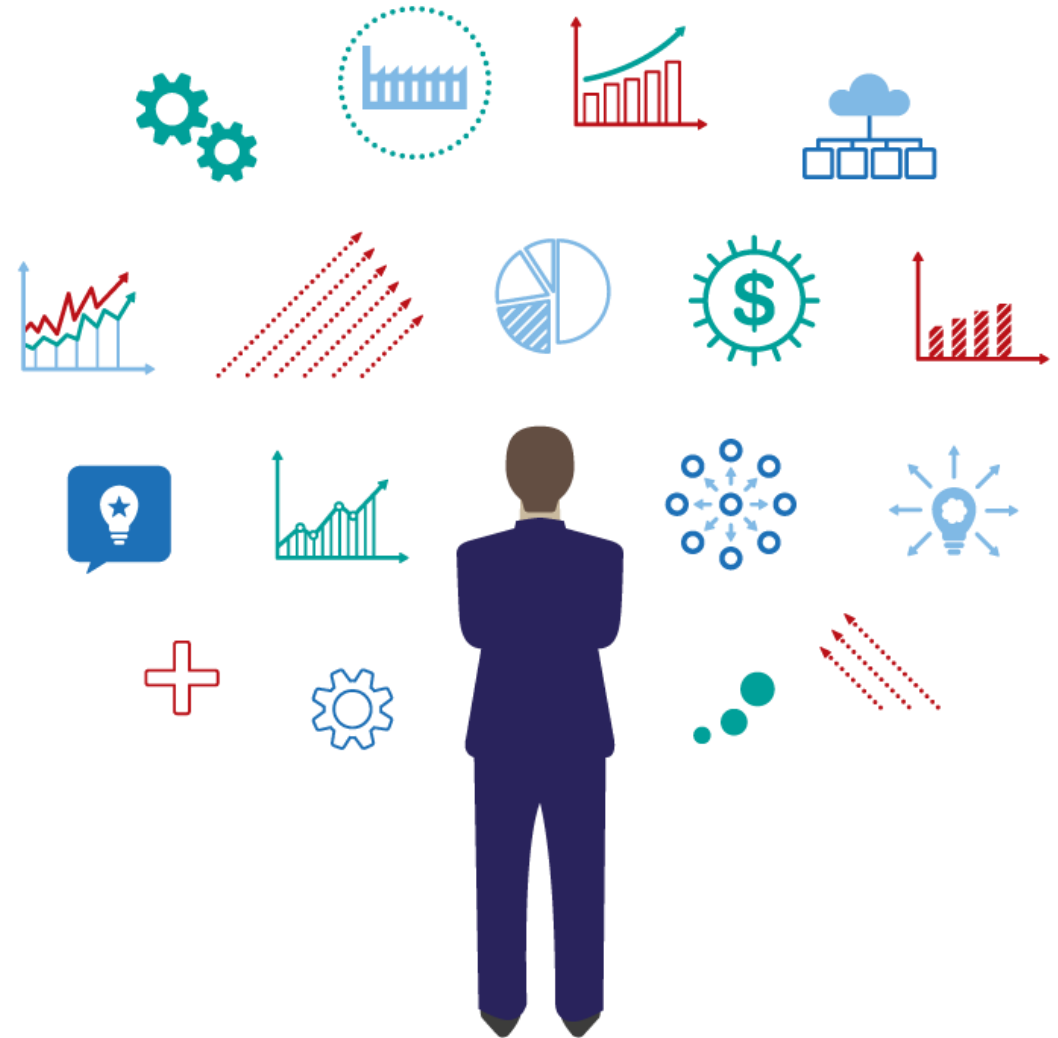
Increase retail investors customer base

- Local investors
- Foreign investors
- Non-resident Pakistani investors

02

Increase corporate business

- Employee contributory/provident funds
- Corporate funds





Increasing investor base & business – roadmap



Activate inactive UINs

Active UINs

Inactive UINs



- Upsell / Increase share
 - Diversify the portfolio
 - Increase investment size
- Direct Sales
 - Hire Sales people to generate accounts
 - Salary + Commission or only commission based on account opened and clients introduced

- Portfolio building approach
 - Dividend yielding stocks
 - Capital gains - highlight
- Equity based mutual funds
 - Pure stock funds
 - Balanced funds
 - Asset allocation funds



Reach existing clients to refer **new potential customers**



Build relationship with corporate clients

- Request CFO to **introduce** to other colleagues
- Request **parent company** for auto referrals in **subsidiaries.**

Corporate Clients



“Corporate clients are easier to maintain, with high fees earning”

Arrange educational sessions & seminars to onboard employees of other departments like admin, IT, marketing etc.

Sessions & seminars



Distribute information brochures

Setup a desk to educate employees.
Distribute brochures for awareness



Email marketing

Circulation of emails like Research and market commentary, how to invest, high dividend yield in own & subsidiary companies to create awareness



Contact point – CTA

Mention point of contact in every collateral, in order to generate maximum leads

“Share research with corporate clients, to add value”

Events participation



Joint events with PSX & CDC

Brokerage houses joint events with PSX or CDC can conduct informatory sessions to educate their retail investor base



Associations

Highlight importance of investment to prospective clients, arrange trade shows & networking events to increase customer base



Sponsorship

Brokerage houses can sponsor events, where they can find potential customers & generate leads. Also holding of short awareness sessions to educate potential customers



Educational institute

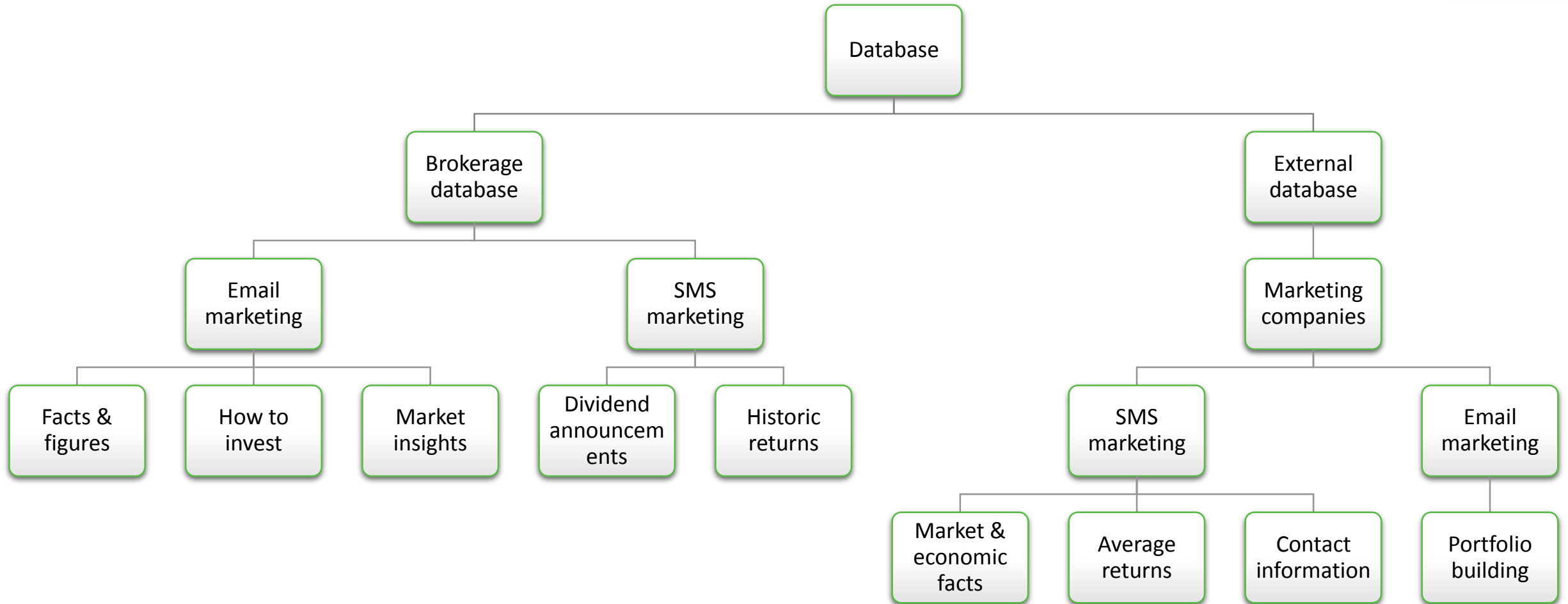
Conduct workshops & informatory sessions in educational institute for fresh graduates. Also competitions should be done to create student interest.



Corporate briefing

Brokerage firms should send their analysts to attend corporate briefing sessions of various companies so they can learn & get more detailed information of different listed companies & their potential growth.

Database marketing



Prepare e-mail & SMS content and share the same for onward distribution

The groups who have Banks & AMCs under them, can cross sell or do cross platform marketing.

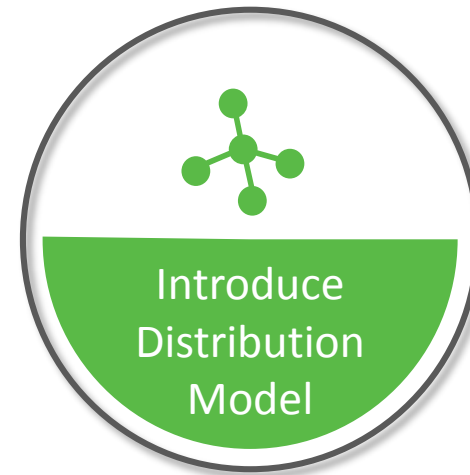
Cross sell to clients



- Credit card statements
- E-statements
- Annual / half yearly deposit account statements



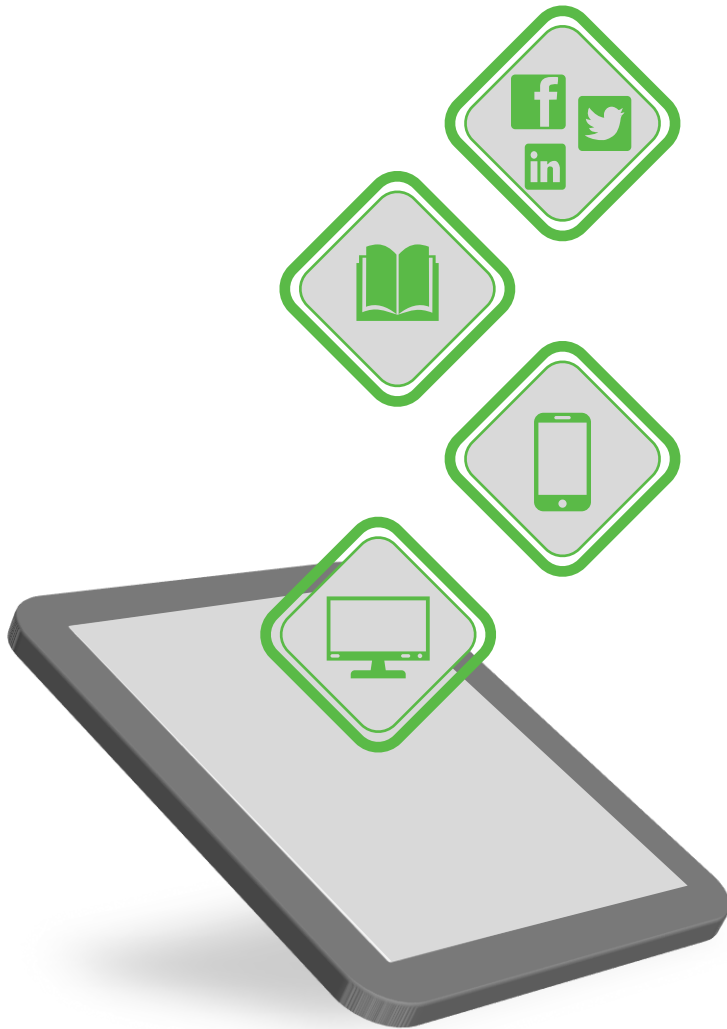
- Monthly FMR & MF statements of AMC's
- Others if available



- Mutual fund distributors
- Registered list available at MUFAP & SECP



- Branded flyers insert in club bills and monthly statements
- Highlight features through ads in club monthly newsletters



1) Informative website

- Brokerage houses should have well developed websites with strong content to educate potential investors.
- Availability of research studies & analytical tools on website

2) Search Engine Optimization

- Add relevant phrases
- Organic reach through search

3) Social media presence

- Maximum usage of social media channels
 - Facebook
 - LinkedIn
 - Twitter
 - Instagram
 - Youtube
- Utilize appropriate target audience to create digital footprint



Boost social media post

- 1) It is very important to boost right social media post to right audience & educate them
- 2) With little marketing budget, brokerages can bring new customer onboard

Highlight success/sponsor stories

- 1) Share interviews / stories of successful individuals on social media channels.
- 2) Go live while conducting interview or hosting an event.

Conduct online surveys

- 1) Conduct online surveys on digital channels to find the gaps.
- 2) Surveys are a means to lead to email & mobile numbers.

Grow Corporate Business



01 Analyze internal databases to assess individual corporate activity and reconnect with all dormant accounts

03 Engage with existing corporates for employee education and awareness programs. Collaborate with PSX for joint sessions for increased retail investor participation.

05 Engage with PSX for increased market depth and participation.



Collect necessary feedback from said corporates and engage with PSX to rectify all concerns

Analyze new and updated databases to attract new corporate clients.

Increase/introduce internet targeted marketing e.g. newsletters, blog posting, social media etc.

02

04

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Thank you