



**QAPITA**

# How a housing finance company saved time by **automating equity management processes**



## ● **Challenge**

Consolidate shareholding data scattered across spreadsheets since 2014

## ● **Goal**

Gain better oversight of complex shareholding structure and transaction history

## ● **Need**

Find an equity solution partner to help manage increasing volume of transactional data

## ● **Priority**

Communicate value of ESOPs to employees as organization grew

## ● **Focus**

Employee wealth generation remained a top priority

## ● **Solution**

Qapita chosen to address these pain points efficiently

## ● **Outcome**

Streamlined processes, improved data accuracy, and enhanced employee engagement

## About the Company

This leading housing finance company is dedicated to enabling millions of Indians to fulfill their dreams of homeownership.

### Their innovative approach combines:

- A proprietary technology platform that revolutionizes the process of estimating and demonstrating undocumented income
- Tailored credit solutions for customers traditionally underserved by financial institutions
- A focus on individuals with monthly incomes around USD 600, many of whom lack formal access to credit

#### COMPANY SIZE

1,000+ employees across 200+ locations  
in 13 states of India

#### LOCATION

Mumbai, India

#### INDUSTRY

Financial Services

#### USE CASE

CAPTABLE at-a-glance, Employee engagement and education, Managing stakeholder data

#### KEY FEATURES USED ON QAPITA

Employee Township, Digital Issuance of Grants, Performance based Grants, Custom Dashboard for Former Employees



Qapita has significantly improved our equity management processes. As a company focused on employee wealth generation, we've made the process more user-friendly and educational regarding ESOPs. Qapita's team provides excellent support with responsive features like consolidated reporting, scenario planning, and clear presentation of ESOP details including tax implications. Their assistance has greatly enhanced our equity management capabilities."

- Chief Financial Officer



# Qapita Enhances Equity Ownership Culture for Leading Housing Finance Company

- Facilitated an interactive townhall led by the CEO, enabling direct employee engagement on wealth creation and performance-based incentives
- Streamlined management of over 5 ESOP plans, including both time-based and performance-based structures
- Developed customized dashboards for former employees to efficiently convert options into shares
- Implemented comprehensive share transfer and issuance tracking during onboarding, establishing a single source of truth for all stakeholders
- Automated generation of critical reports including Cancellation, Lapse, ESOP summaries, and Captable holdings, significantly reducing HR workload and improving accuracy



**Rated #1**  
**Equity Management Software.**  
Loved By Customers Worldwide.



Ready to transform your equity management?

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