

**Request For Proposal (RFP)
From
MARKETING TECHNOLOGY PARTNER
FOR
FULL-STACK NEXT-GEN MARKETING TECHNOLOGY PLATFORM
ENABLED WITH CUSTOMER DATA PLATFORM (CDP)**

**DIGITAL DEPARTMENT
Canara Robeco Asset Management Company Limited.**

Construction House, 4th Floor,
5, Walchand Hirachand Marg, Ballard Estate,
Fort, Mumbai, Maharashtra 400001

22nd day of December 2025

Important Note: Applications in response to this RFP are invited to carry out a preliminary evaluation to assess the suitability of the applicants to take up the assignment based on our internal norms.

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1. ABOUT THE COMPANY

Canara Robeco Asset Management Company Limited (CRAMC) (formerly known as Canbank Investment Management Services Limited) was incorporated under the Companies Act, 1956 on March 2, 1993, with its registered office at Construction House, 4th Floor, 5, Walchand Hirachand Marg, Ballard Estate, Mumbai - 400 001. Canara Robeco Mutual Fund (CRMF) (formerly known as Canbank Mutual Fund) was constituted as a public trust on December 17, 1987, under The Indian Trusts Act, 1882 (2 of 1882) by Canara Bank as the Settlor/Sponsor. Thereafter, pursuant to Mutual Funds Regulations 1993, CRMF has been registered with Securities & Exchange Board of India (SEBI) vide registration No. MF/004/93/4 dated October 19, 1993. By and under the Investment Management Agreement (IMA) dated June 16, 1993, executed between CRMF and CRAMC, CRAMC has been appointed as the Asset Management Company of CRMF by its Trustees.

2. ELIGIBILITY CRITERIA

Vendor will be eligible if they comply with Annexure I – Cloud Security Assessment Checklist and following

Criteria	Submission
The proposed OEM solution should have been implemented in at least 5 organisations belonging to the Financial Services Industry with at least 1 in Asset Management and 2 in Wealth Management / Securities Business	OEM to submit customer testimony in the form of any publicly available case study, link to video testimony to the effect that the solution is implemented and working satisfactorily.
The bidder shall be the OEM/ System Integrator/ Certified or authorized reseller/ partner for supply of Licenses and solution implementation and maintenance support under warranty/ AMC of the proposed solution. OEM proposed by bidder should have its development centre in India.	Bidder should specifically certify in this regard on company letter head.
The Bidder should have at least 50 technical resources (In India) on its roles across areas such as Technical Architecture, Engineering/ Development/ Testers, Design Engineers, Business Analyst (in BFSI Domain) as on the date of RFP.	Undertaking from the bidder on bidder's letter head signed by the authorized signatory of the bidder.
Bidder should have implemented / supported the proposed solution in at least 3 customers from the Financial Services Industry	Letter / Mail to be submitted from the reference clients with the name of the module implemented / supported.

3. SCOPE OF WORK

Canara Robeco Asset Management Company is an investor-centric asset management company. In an increasingly competitive mutual fund landscape, leveraging Marketing Technology (MarTech) solutions has become imperative. Canara Robeco aims to deploy an Advanced Marketing Platform that will fundamentally transform operations by driving efficiency, deepening investor relationships, and enabling hyper-personalized engagement at scale.

The Marketing Platform is designed to significantly enhance critical business outcomes including investor acquisition rates, asset retention, systematic investment plan (SIP) persistence, and overall investor lifetime value. This strategic initiative represents a cornerstone investment in our digital capabilities, establishing frameworks that will revolutionize how we acquire, engage, and retain investors. By embracing these cutting-edge technologies, Canara Robeco will architect highly sophisticated communication strategies that deliver contextually relevant and impactful investor interactions across every touchpoint.

Through data-driven intelligence and predictive analytics, our approach will provide comprehensive insights into investor behaviors, preferences, and lifecycle patterns. This deep understanding will enable Canara Robeco to orchestrate precision marketing campaigns, optimize marketing investments, and substantially enhance return on marketing spend. The platform implementation signifies a comprehensive transformation of marketing operations, elevating investor experiences, and securing a leadership position in the asset management industry.

Solution Components

To accomplish our strategic marketing objectives, we require an integrated technology suite comprising the following core components:

A. Omni-Channel Campaign Orchestration

- **Marketing Automation Excellence:** The solution must deliver sophisticated automation capabilities to streamline marketing workflows and ensure flawless execution of campaigns across multiple investor touchpoints.
- **Investor Engagement Tools:** Comprehensive capabilities for managing and nurturing investor relationships through personalized, contextually relevant interactions across their entire lifecycle.

B. Investor Audience Intelligence

- **Advanced Segmentation:** Sophisticated ability to segment and manage investor audiences based on behavioral, transactional, demographic, and psychographic attributes, ensuring highly targeted and relevant communications.
- **Predictive Audience Modeling:** Leverage machine learning to predict investor behaviors, preferences, and propensities for enhanced targeting precision.

C. Experimentation and Personalization Engine

- **Testing Framework:** Robust infrastructure for conducting A/B testing and Multivariate Testing (MVT) to continuously optimize marketing strategies and content performance.
- **Hyper-Personalization:** Advanced personalization capabilities to tailor content, offers, and experiences to individual investor preferences, behaviors, and lifecycle stages.

D. Security and Data Governance Module

The security infrastructure must include:

1. Capability to generate unique universal identifiers (UUID) for each Canara Robeco investor and maintain secure mapping between UUID (token) and Personal data such as name, email, mobile number, PAN, and other personal data.
2. Seamless data exchange capabilities with other solutions (hosted on cloud or Internal Canara Robeco systems) using APIs/SDKs leveraging public & private keys or API keys and secrets for authorization.
3. Configurable data masking functionality to protect personal data fields.
4. Robust API infrastructure to read/write data from the secure data vault.
5. Flexible deployment options supporting both on-premises and cloud infrastructure.
6. Scalability to meet Canara Robeco's requirements for investor base and transaction volumes.

E. Enterprise Integrations

The platform components (SaaS or on-premises) require integration with Canara Robeco's existing and planned technology ecosystem:

- **Security and Data Vault Integration:** All MarTech components must integrate with the tokenization and data vault infrastructure for secure information exchange based on provided tokens.
- **Data Platform Integration:** MarTech systems must integrate with data warehouses and analytics platforms for data persistence, campaign data management, and analytics from internal and external systems.
- **Message Queue Integration:** Systems must integrate with message queues and topics to publish messages for various purposes such as SMS delivery, email transmission, WhatsApp messages, and RCS communications.
- **Content Management Integration:** Campaign Management and A/B Testing systems require integration with Content Management System (CMS) and Digital Asset Management (DAM) for retrieving content templates, storing visual assets like images, banners, videos, and HTML/JavaScript components for personalized experiences and experiments.

- **Authentication Integration:** MarTech systems must integrate with Canara Robeco's Identity Access Management (IAM) or Active Directory authentication mechanisms.

Guiding Principles

The proposed solution must adhere to the following overarching principles:

A. Insight-Driven Architecture

Design systems that provide actionable insights, not just raw data access. Architecture should support automation for technical teams and intuitive UI-based intelligence for business stakeholders including marketing managers, channel owners, and data analysts.

B. Campaign Velocity

Prioritize rapid campaign execution capabilities with standardized campaign schemas, reusable content templates, and consistent measurement frameworks to ensure minimal turnaround time. Campaign throughput velocity should be a key performance indicator.

C. Platform Agnostic Standards

Campaign management schema should be abstracted and versatile, with only last-mile execution being channel-specific (true omni-channel design). Solutions should be portable across different architectures with global standards and localized execution.

D. Intelligent Real-Time Data Utilization

Strike the optimal balance in leveraging real-time and near-real-time investor data. Triggering, filtering, and suppression should operate in real-time, while model scoring and performance measurement can be processed in batch mode.

E. Unified Investor Experience

Maximize the potential of investor-facing channels to deliver seamless and cohesive experiences that enhance engagement, build brand affinity, and drive business outcomes.

F. Technology Aligned to Strategy

Technology decisions must enable business strategy and be informed by strategic objectives during scoping and design phases.

G. Data as Strategic Asset

Foster both collection (structured and unstructured) and democratized sharing of data, with structures meeting end-user needs and sophistication levels.

H. Ownership and Control

Ensure complete ownership of marketing technology and Canara Robeco data when hosting within trusted third-party cloud infrastructure, with comprehensive access and control.

I. Platform Ecosystem Approach

Manage the solution as an interconnected set of interoperable technologies, enabling seamless cross-channel marketing experiences and investor engagement.

J. Security and Traceability First

Prioritize protection of information integrity, availability, confidentiality, and authenticity. Establish robust security measures including comprehensive auditing of internal and third-party systems.

K. Privacy-Compliant Operations

Facilitate privacy and ethics-compliant data sharing and storage in third-party clouds through proper utilization of enterprise-grade technologies.

L. Omni-Channel Service Delivery

Create products and services catering to all investor channels including digital (web/app/email/social) and traditional (branch offices, contact centers, distributor networks).

M. Extensible and Reusable

The solution should be reusable by Canara Robeco and future vendors, serving as an enterprise marketing platform capable of integrating with future technology extensions.

N. Real-Time Communication Infrastructure

The solution must span all channels without silos and facilitate real-time and near real-time communications.

O. Investor Experience Excellence

Drive superior investor experiences by digitizing, enhancing, and optimizing investor journeys while prioritizing usability and enabling personalized experiences.

P. Configurable and Extensible

Enable rapid deployment of new features and capabilities through configurable tiered environments and microservice-based architecture.

Q. Open API Ecosystem

APIs should be designed with open standards that integrate seamlessly with new systems, remain flexible to change, and enable ecosystem partners to extend capabilities.

R. Self-Service Empowerment

Transition toward an autonomous organization with enhanced self-reliance by providing comprehensive self-service options within the platform.

S. Standards-Based Interoperability

Optimize interoperability within the platform ecosystem by leveraging industry communication standards and protocols.

T. Security by Design

Build security at each architectural layer to protect against threat vectors. Support fine-grained role-based access controls.

U. Agile Delivery Methodology

Employ modern agile methodologies to reduce time-to-market through continuous delivery of incremental production releases.

V. DevSecOps Automation

Automate software delivery and operations tasks within the platform using DevSecOps practices.

W. Cloud-Native Scalability

Deploy the platform on scalable cloud infrastructure while adhering to Canara Robeco guidelines regarding data privacy, security, and workload management.

Vendor Responsibilities

1. Core Deliverables

The vendor is accountable for end-to-end setup, implementation, and delivery of the Marketing Platform for investor marketing and distribution across the mutual fund value chain including Distribution Management, Sales and Marketing, Investor Onboarding, Transaction Processing, Investor Servicing, and Redemption Management. The solution will serve all existing and prospective investors, employees, distribution partners, and authorized agencies.

The vendor shall implement and deliver the solution supporting the following digital interaction channels (mandatory):

- **Email:** Transactional and promotional email communications
- **Web and App Push Notifications:** Browser and mobile app push messaging
- **SMS:** Short message service for alerts and notifications
- **In-App Notifications:** Native mobile application messaging
- **WhatsApp:** WhatsApp Business Platform messaging
- **RCS (Rich Communication Services):** Next-generation SMS with rich media
- **Web & App Personalization:** Dynamic content personalization across digital properties

2. Project Execution

The vendor shall develop a comprehensive project plan with clearly defined delivery timelines and milestones, incorporating the execution approach. Agile development methodology will be followed with all necessary ceremonies included in the delivery plan.

3. Integration Development

The vendor shall consume third-party solution APIs provided by Canara Robeco and implement all required external integrations. Where applicable, the vendor shall develop

integrations with internal systems provisioned by Canara Robeco including conversational platforms (chatbots, virtual assistants), cloud-based security services (CDN, WAF, DDoS protection, API security).

4. Technology Procurement and Implementation

The vendor is expected to procure, configure, implement, and integrate cloud-based SaaS or on-premises solutions for Campaign Management, Audience Management, A/B/MVT Testing, and Security Modules for token management and secret management. All proposed products must be well-established, enterprise-grade solutions with references in the BFSI sector in India, with OEM support available in India.

5. Data Platform Integration

The vendor shall consume data APIs provided by Canara Robeco's Data Platform (Data Warehouse & Analytics) that will be provisioned through separate procurement.

6. Interim Solution Setup

The vendor is responsible for rapid setup of an interim solution to enable initial campaign launches across Email, SMS, WhatsApp, RCS, Web Push, App Push, In-App Notifications, and Web/App Personalization

7. Expertise and Capability

The vendor represents and acknowledges possessing necessary experience, expertise, and ability to undertake and fulfill all obligations involved in this engagement. The vendor confirms that the proposed solution will comprehensively meet all stated requirements.

8. Scope Inclusivity

Any services, functions, or responsibilities not explicitly described but inherently necessary or customary for proper delivery shall be deemed included within the scope and provided at no additional cost to Canara Robeco.

Detailed Scope of Work

1. Technology Component Deployment

Platform Acquisition and Configuration

Source, deploy, install, configure, and integrate the following components:

- Multi-channel campaign orchestration platform (including marketing automation and investor engagement)
- Investor audience management platform
- A/B/MVT and personalization engine
- Tokenization and data vault system for token generation, secrets management, and data masking

Infrastructure Provisioning

Source hardware to host software components and integration layers

Integration Development

- APIs for credential retrieval based on application key
- APIs for tokenization and detokenization
- APIs for data masking and de-masking
- APIs for encryption and decryption
- APIs to fetch investor communication and required information based on token in single and batch modes
- APIs to generate and store tokens/UUIDs for investors in real-time (synchronous) and batch (asynchronous) modes

2. Requirement Validation and System Design

Stakeholder Engagement

Conduct comprehensive sessions with senior stakeholders to gather detailed functional and non-functional requirements.

Architecture Design

Design detailed system architecture including data flows, system components, integration points, ensuring high availability, scalability, and security.

Documentation

Prepare comprehensive requirement documents and system design specifications for development and project teams.

3. Technology Setup and Infrastructure

Infrastructure Provisioning

Acquire and provision appropriate physical or cloud infrastructure including servers, storage, and network resources as per project scope.

Environment Configuration

Configure non-production (development and testing) and production environments for all components, including databases, servers, and middleware as required on-premises or in cloud.

Security Implementation

Implement security protocols, firewalls, encryption, and access controls to protect data and systems.

4. Initial Platform Readiness

Platform Installation and Configuration

Install necessary software applications and configure them according to project requirements.

System Integration

Integrate various systems and applications to ensure seamless data flow and functionality across the platform.

Quality Assurance

Perform unit, integration, and system testing to ensure the technology setup meets specifications and is deployment ready.

5. Pilot Program Launch

Pilot Planning

Select pilot user groups for testing. Define scope, objectives, and duration of the pilot program.

Implementation

Deploy the solution to pilot groups with all necessary support infrastructure in place.

Feedback and Optimization

Collect feedback from pilot users, identify improvement areas, and implement necessary adjustments to systems and processes.

6. Training, Maintenance, and Support

Training Programs

Develop and deliver comprehensive training programs for end-users, IT staff, and administrators, including manuals, online training modules, and hands-on sessions.

Maintenance Schedule

Establish routine maintenance schedule to update software, patch security vulnerabilities, and perform system health checks.

Technical Support

Set up technical support framework including helpdesk support, online portals, and emergency response mechanisms.

7. Managed Services for Ongoing Operations

Operational Management

Implement technologies and processes for daily operations, monitoring, and platform management.

Delivery Management

Create delivery plan with milestones and dates. Manage and maintain requirement and defect backlog in orderly manner. Monitor regularly in agile ceremonies and address backlog within defined SLAs.

Continuous Improvement

Regularly review system performance, user feedback, and business requirements to identify improvement opportunities.

Strategic Planning

Work with business leaders to align platform evolution with long-term business goals including scalability, new technology adoption, and cost-efficiency.

Campaign Configuration

Configure technology to support ongoing business activities (campaigns, tests, experiments).

Quality Assurance

End-to-end QA and approval of ongoing business activities.

Launch and Monitoring

Launch ongoing business initiatives using platforms and monitor activities for optimization and reporting.

Experimentation Support

Support end-to-end experimentation of business activities.

Future Integration and Customization

Implement configuration, customization, and platform integrations based on evolving business needs.

Responsibility Matrix

The responsibility of different activities (indicative list and not exhaustive) anticipated for Integration of Full Stack Next Gen Marketing Technology Platform enabled with CDP for CRAMC among the bidder and CRAMC is as below and detailed subset activity matrix to be refer under technical evaluation – Appendix E

Legend: R = Responsible | A = Accountable | C = Consulted | I = Informed

Sr	Activity	Bidder	IT	Digital	CISO	DPO
1	Business requirements gathering	R	C	A	I	I
2	Data model design	R, A	C	C	C	C
3	Architecture of integration services and components	R, A	C	C	C	I
4	Setup and provisioning	R, A	C	I	C	I
5	User Access and Security	R, A	C	A, I	C	C
6	Integration and Data management	R, A	C	A, I	C	C
7	Continuous monitoring and optimization	R, A	I	C	I	I
8	Marketing activity planning	R, C	I	R, A	I	I
9	Campaign design	R, C	I	R, A	I	I
10	Campaign setup, launch and management	R, A	C	R, A	I	I
11	Reporting and analytics	R, A	C	C	I	C
12	Experimentation and Optimization	R, A	I	A	I	I
13	Future-proofing and scalability	R, A	C	C	C	I
14	Management, Maintenance and support	R, A	C	I	C	I
15	Periodic patches and updates	R, A	C	I	C	I
16	Security audits and compliance reviews	R, A	C	I	I	I

17	Audit conformity and compliance	R, A	C	I	I	I
18	SLA report generation and submission	R, A	C	I	I	I
19	Supply, implementation, customization, and support	R, A	C	C	C	C

4. APPLICATION USE CASES AND FEATURES

- **Investor Communication Requirements** (Refer Appendix A under Technical Evaluation Document)
- **Distribution Partner Communication Requirements** (Refer Appendix B under Technical Evaluation Document)

5. FUNCTIONAL REQUIREMENTS (REFER APPENDIX C under Technical Evaluation Document – For illustration purpose and subject to change)

The following table details the comprehensive functional requirements for below functions:

1. Campaign Management Functional Requirements

- Campaign Planning and Strategy
- Campaign Design and Setup
- Content Creation and Management
- Audience Segmentation
- Campaign Execution
- Campaign Testing and Optimization
- Analytics and Reporting
- Data Management
- Delivery and Reputation Management
- Creative Design and Content
- GenAI Capabilities

2. Audience Management Functional Requirements

- Data Ingestion
- Segmentation and Audience Creation
- Behavioural Predictions
- Activation and Orchestration
- Lifecycle Management
- Attribution and Optimization
- GenAI Capabilities

3. A/B and Multivariate Testing Functional Requirements

- Audience Segmentation
- Behaviour Tracking
- Data Import and Export
- Test Design and Creation
- Test Optimization
- Test Scheduling
- Reporting

- h. Test Analysis
- i. Targeting and Personalization
- j. GenAI Capabilities

4. Integration Requirements

6. NON-FUNCTIONAL REQUIREMENTS (REFER APPENDIX D – FOR ILLUSTRATION PURPOSE AND SUBJECT TO CHANGE)

- a. Usability and User Experience
- b. Access Control and Authentication
- c. Audit and Logging
- d. Data Privacy and Compliance
- e. Performance and Scalability
- f. Integration and Interoperability
- g. Monitoring and Support

7. Communication Channels - Detailed Specifications

a. Web and App Push Notifications

- Rich push notification templates with images, videos, and action buttons
- Deep linking to specific app screens or web pages
- Personalization using investor attributes and behavioural data
- Delivery optimization for higher delivery rates
- Throttle message delivery with queue management
- Support for both iOS and Android platforms
- Web push for desktop and mobile browsers
- Expiry settings for time-sensitive messages
- A/B testing and multivariate testing capabilities
- Real-time analytics on delivery, opens, clicks, and conversions

b. Email Communications

- Drag-and-drop email editor with template repository
- Multilingual email content (English, Hindi, regional languages)
- Personalization with dynamic content and mail merge
- Conditional display of content blocks
- Attachment support (up to 2 MB)
- HTML and plain text email support
- Preview across devices and email clients
- Scheduling for future date and time
- A/B testing and multivariate testing
- Anti-spam features (SPF, DKIM, DMARC)
- Separate unsubscribe for promotional and transactional emails
- Inbox delivery assurance with reputation management
- Real-time delivery reports and bounce management

c. SMS Messaging

- Integration with any SMS vendor
- URL shortening service with custom domain support
- Personalization based on investor attributes
- DND (Do Not Disturb) management and compliance
- Frequency capping to limit messages per day
- Keyword subscription management
- Delivery reports with sent, delivered, failed status
- Unicode support for regional languages
- Fallback to SMS if other channels fail
- A/B testing for message variations

d. In-App Notifications

- Display messages within mobile app based on trigger criteria
- Out-of-the-box templates for personalization
- HTML-based templates for brand-specific communications
- Support for landscape and portrait mode
- Multi-page surveys and gamified experiences
- Non-intrusive nudges as overlays
- Customizable animations and placement control
- Targeting users based on interaction
- A/B testing and personalization
- Real-time analytics on impressions, clicks, conversions

e. WhatsApp Business Messaging

- Integration with WhatsApp Business Platform
- Template message management and approval workflow
- Interactive conversations with quick replies and CTAs
- Rich media support (images, videos, documents, location)
- URL shortening with custom domain
- Personalization based on investor attributes
- Real-time campaign analytics (sent, delivered, read, replied)
- DND management and frequency capping
- Two-way conversational capabilities
- Automated responses and chatbot integration
- Session message support for ongoing conversations
- Opt-in and opt-out management

f. RCS (Rich Communication Services)

- Rich media cards with images, videos, carousels
- Suggested actions and quick reply buttons
- Branding elements with logo and business verification
- Interactive elements (calendars, location sharing)
- Delivery and read receipts
- Fallback to SMS for non-RCS devices
- Personalization with dynamic content
- Campaign scheduling and automation

- Real-time analytics on delivery and engagement
- A/B testing capabilities
- URL tracking and click analytics

g. Web & App Personalization

- No-code visual editor for personalization
- Personalize website elements: pop-ups, banners, nudges, CTAs, text, images, layouts
- Dynamic content based on investor profile, behavior, and preferences
- Real-time personalization engine
- Product recommendations based on AI/ML models
- Behavioral targeting and retargeting
- Session-based personalization
- Geo-location based personalization
- Device and browser based personalization
- Language preference based personalization
- A/B testing and multivariate testing for personalized experiences
- Real-time analytics on personalization performance

8. Success Metrics and KPIs

a. Campaign Performance Metrics

- Email open rates, click-through rates, conversion rates
- Push notification delivery rates, open rates, click rates
- SMS delivery rates, click-through rates
- WhatsApp message delivery, read rates, response rates
- RCS message delivery, engagement rates
- In-app notification impressions, clicks, conversions
- Web/app personalization engagement and conversion lift

b. Investor Engagement Metrics

- Investor acquisition rate
- SIP registration rate
- SIP persistence rate
- AUM growth rate
- Investor retention rate
- Cross-sell and up-sell conversion rates
- Investor lifetime value

c. Operational Metrics

- Campaign creation time
- Campaign execution time
- Time to market for new campaigns
- Platform uptime and availability
- API response times
- Data processing latency

d. Marketing Efficiency Metrics

- Marketing ROI
- Cost per acquisition
- Cost per conversion
- Channel-wise ROI
- Segment-wise performance

9. Compliance and Regulatory Requirements

a. Data Protection and Privacy

- Compliance with Digital Personal Data Protection (DPDP) Act 2023 and DPDP Rules 2025
- Compliance with applicable IT Rules 2011
- Adherence to SEBI CSCRF and any other rules specified thereunder

b. Financial Services Regulations

- SEBI (Mutual Funds) Regulations compliance
- AMFI code of conduct adherence
- TRAI regulations for commercial communications

c. Security Standards

- ISO 27001 certification
- ISO 27701 (Privacy Information Management) certification
- SOC 2 Type II compliance
- Regular security audits and penetration testing

10. SUPPLY AND LICENSING

The OEM partner shall provide CRAMC with licenses for the **1 Super Admin, 2 Admin and 3 Campaign Management Users** for the duration of the Agreement term, licenses can increase during the agreement term, cost of new licenses remain same for next 3 years. These licenses entitle CRAMC should be configured as per Business needs.

CRAMC will not be responsible or liable for any infringements or unauthorized use of the licensed products by the Bidder in performance of any activity/obligations undertaken by the Bidder in terms of this RFP. In the event of any claims against CRAMC for any license related issues, the selected Bidder will have to act upon the same and all liabilities and claims whatsoever will have to be settled by the selected Bidder and the CRAMC shall be kept indemnified against any such liabilities.

Further if the selected Bidder has missed out providing any required licenses to CRAMC, then CRAMC will not bear any additional amount for procurement of such licenses at a later date.

The OEM shall provide updates, upgrades and patches for the Platform(s) and database software(s) during the term of the Agreement, as applicable.

Onsite Support Services:

The Bidder shall depute dedicated supported on need base after delivery of project.

Qualification & Experience of Personnel for Support:

The product installation and maintenance shall be done by trained & experienced personnel, having current knowledge on the solution.

CRAMC reserves the right to ask for replacement of the Customer Success Manager/Business Analyst based on their performance. Bidder must replace such Customer Success Manager/Business Analyst with competent resource complying with the qualification and experience mentioned in the RFP within 10 days from the date of communication from the CRAMC.

Description	Minimum Qualification
L3	Should have minimum Graduate and should be similar technology related stream or equivalent with minimum 8 years of relevant post qualification experience in similar solutions as proposed in this RFP. L3 resource will be responsible for end-to-end management of the solution including installation, configuration, troubleshooting, coordinating with OEM etc.
L2	Should have minimum Graduate and should be similar technology related stream or equivalent with minimum 6 years of relevant post qualification experience in similar solutions as proposed in this RFP. L2 resource should coordinate with L1 & L3 resources for smooth functioning of the project.
L1	Should have minimum Graduate and should be similar technology related stream or equivalent with minimum 4 year of relevant post qualification experience in similar solutions as proposed in this RFP.

11. SUBMISSION OF PROPOSAL

Proposals are required to be submitted as per the following directions and as per the formats mentioned in Annexures.

“Request for Proposal from Marketing Technology Partner for Full Stack Next Gen Marketing Technology Platform enabled with CDP (Customer Data Platform)”

- a. Envelope 1 (unsealed) containing the following:
 - i. A letter authorizing the person to sign the proposal and other documents on behalf of the Bidder,
 - ii. Certificate/Declaration (if any).
- b. Envelope 2 (sealed) containing the Technical Bid.
- c. Envelope 3 (sealed) containing the Financial Bid, to be opened by CRAMC. privately, after the technical evaluation. The bids will not be opened in the presence of the shortlisted Bidders.
- d. The proposed procurement/ subscription would be for 2 years (i.e. from Month, Date, 2026, to Month Date, 2028) and shall be renewed for a further period subject to review by CRAMC, Incremental subscription fee need to be fixed in % and will be same for all renewal cycles.

- e. The Company reserves the sole right to shortlist and award the assignments based on specified criteria and subject to approval of the appointment by Competent Authority.
- f. Mere submission of application does not, in any way, constitute a guarantee for award of any assignment by the Company

Please note that the financial bid shall be considered valid for 90 days from the last date of submission of the bid.

The proposal (all three envelopes) can be submitted latest by **17:00 hours on 9th January 2026** at CRAMC office, at Construction House, 4th Floor, 5, Walchand Hirachand Marg, Ballard Estate, Mumbai 400 001 in hard copies in original, duly signed by the authorized officer of the Bidder. The sealed Bid envelopes should be delivered to the CRAMC Office between 10:00 hours to 17:00 hours on Monday to Friday, working days only.

For any queries, please contact at CRAMC at digital@canararobeco.com. No proposal will be entertained after the appointed time and date. The Company will not be responsible for any postal/ courier delay. The proposals received after the appointed time and date will be rejected.

Proposals with any conditionality shall be summarily rejected. Financial aspects of the proposal should not be disclosed in any way other than in the financial bid. Technical bids containing any indication to the financial bids will be rejected.

Incomplete proposals, conditional proposals, proposals not conforming to the terms and conditions set out herein will be rejected by the Company.

Misrepresentation of any fact within the proposal would lead to cancellation of the contract apart from any other actions which the Company would be entitled to take.

The Company reserves the sole right to accept or reject any or all Proposals received without assigning any reasons thereof. The decision of the Company / Committee on the selection of the bidder shall be final.

12. TIME FRAME

The following is an indicative time frame for the overall selection process. The Company reserves the right to revise/modify this time frame at its absolute and sole discretion and without providing any notice/intimation or reasons thereof to any of the Bidders. Changes to the time frame will be conveyed to the affected Bidders during the process.

RFP Notification:

Last date of submitting queries	Friday, January 2, 2026
Last Date of Proposal Submission	Friday, January 9, 2026

13. PROCEDURE FOR SELECTION

1. Qualified interested Bidders, need to meet the set criteria and comply with all compliance checklists.

— Canara Robeco Asset Management Company Ltd.

2. The Committee would evaluate the bidders on the criteria mentioned in RFP and shortlist bidders scoring above a pre-determined threshold or any other criteria that Committee may deem fit.
3. The Committee would open the Financial Bids of shortlisted bidders as per internal procedure. The date and time of opening of the Financial Bids will be announced as per RFP Notification.
4. The marks scored by shortlisted bidders in the technical evaluation will then be given a weightage of seventy percent. Similarly, the Financial Bids of the bidders will be given a weightage of thirty percent. The combined score of Technical and Financial Bids will determine the H1 (Bidder scoring highest point / marks), H2, H3 and so on. The Company will select such number of bidders as deemed appropriate who agree to undertake the assignment. The Company will use waterfall for the next bidder in case any shortlisted bidder does not accept the appointment. The Bid scores will not be made public, and neither will the bids be opened in the presence of the Bidders.
5. Bidders will be present their solution once they are selected in Technical bid, this will help us to finalize the partner.
6. The bidder scoring the highest points/marks (H1) based on the above principles would be appointed for the transaction. Other Bidders will be update their status accordingly.

14. REQUIREMENTS OF FINANCIAL BID

- a. The fee quoted should be unconditional. Each bidder is required to submit its financial bid along with a covering letter and financial bid.
- b. The fee quoted by the Bidder should be exclusive of Goods and Services Tax but inclusive of out-of-pocket expenses etc. The Goods and Services Taxes should be indicated separately while raising the bills for payment of fee. All bills are to be raised in INR and will be payable in INR only after successful and satisfactory closure of the transaction.

15. COMPLIANCE

a. Due Diligence

The Bidder is expected to examine all instructions, forms, terms, and specifications in this RFP. Application shall be deemed to have been done after careful study and examination of this RFP with full understanding of its implications. The Application should be precise, complete and in the prescribed format as per the requirement of this RFP. Failure to furnish all information required by this RFP or submission of Application not responsive to this RFP in every respect will be at the Bidder's risk and may result in rejection of the Application.

b. Confidentiality

The Invitation document is confidential and is not to be disclosed, reproduced, transmitted, or made available by the Recipient to any other person. The Invitation document is provided to the Recipient on the basis of undertaking of confidentiality given by the Recipient to Company. The company may update or revise the document or any part of it. The Recipient acknowledges that any such revised or amended

document shall be received subject to the same confidentiality undertaking. The Recipient will not disclose or discuss the contents of the document with any officer, employee, consultant, director, agent, or other person associated or affiliated in anyway with Company or any of its customers or suppliers without the prior written consent of Company.

c. Cost of Participation

The Bidder shall bear all costs associated with the preparation and submission of its Application and CRAMC, will in no case be held responsible or liable for these costs, regardless of the conduct or outcome of the selection process.

d. Clarification of RFP Documents

A prospective Bidder requiring any clarification on this RFP may contact CRAMC in writing by E-mail at digital@canararobeco.com. CRAMC shall respond in writing by E-Mail to any request for clarification of the application documents, from the prospective Bidders, which it receives not later than 2nd January 2026. Further CRAMC will respond by E-Mail to all clarifications, without identifying the source of the inquiry. CRAMC shall not be responsible for any external agency delays.

e. Amendment of RFP Document

- CRAMC reserves the sole right to include any addendum to this entire selection process. The Bidders shall not claim as a right for requiring CRAMC to do the previously mentioned.
- At any time before the deadline for submission of proposals, CRAMC may, for any reason, whether at its own initiative or in response to a clarification requested by prospective Bidders, modify this RFP Document.
- All Bidders who have responded to this RFP shall be notified of the amendment in writing by e-mail, fax, or post, and all such amendments shall be binding on them.
- If required, in order to allow prospective Bidders reasonable time in which to take the amendment into account in preparing their applications, CRAMC reserves the right to extend the deadline for the submission of applications. However, no request from the Bidder shall be binding on CRAMC for the same.

16. INFORMATION REQUIRED (Below Form is part of Technical Bid)

Sr. No.	Particulars	Details
Basic Data		
1	Name of the Firm	
2	Address of Head Office	
	Number of Branch Offices (Specially mention the office address, Partner and other details of the contact person in Mumbai office)	
3	Constitution	
4	Date of Establishment	
5	Company/Firm's Head Office Address	

6	Registered Office Address					
7	GST Number					
8	Whether the Firm or any partner has ever been debarred by SEBI/RBI/CAG/BSE/NSE or any Government Organization & if yes, details:					
	Regn. No.					
	Name of the partner (Note: Partner includes Partnership Partner, LLP, or a limited Company. Partner includes director as well.)					
	Brief reasons for debarment					
9	Whether your firm had or is presently having any kind of professional/business association directly with Canara Bank, Orix Corporation (Japan) or Robeco Group NV (Netherlands) or any of their associates in India or elsewhere, which is likely to result in conflict with the proposed assignment under this RFP?					
10	Name, Designation, Tel. No, E-Mail of the authorized signatory submitting the RFP (Please enclose the copy of board resolution)					
11	Any pending or past litigation (within three years)? If yes, please give details					
12	For past 3 Financial years : Turnover, Net Profit, Net Worth, Balance Sheet, P&L Statement (Supporting's to be enclosed)					
13	Brief profile of Partners/Director in the following manner)					
	Name	Qualification	Total Experience	Experience with Current firm	Certificate number	
14	Past experience of similar nature					
	Name of Banks/NBFC/AMC	Nature Of Assignment	Year of Assignment	Project Manager	No of Applications	

17. DOCUMENTS TO BE SUBMITTED

Bidder shall submit the following documents along with the application.

1. Mandatory Information as per point no. 2.0 above
2. Copies of certificate of experience including project details etc., in relation to similar assignment performed elsewhere, if any.
3. Copies of Registration Certificate issued to the Partner (If any).
4. Copy of Constitution Certificate issued.
5. Compliance Report of the Product/Platform (If any)
6. Use case of Marketing Technology Platform (MTP) for same kind of Requirement.
7. Acceptance Letter of the RFP and its provisions
8. Project Plan and Approach
9. Presentation of the Proposed Solution (The bidder may be required to present solution if requested by CRAMC Team)
10. Any form of canvassing/lobbying/influence/cartelization, etc. by the Bidder may result in disqualification of such Bidder.
11. Technical Evaluation Document along with supporting documents.
12. Commercial Bid Document

13. Compliance Requirements as per Annexure - I
14. Application format for Procurement of Full-Stack Next Gen Marketing Technology Platform enabled with CDP (Customer Data Platform) as per Annexure - II
15. Letter of confirmation regarding non-disqualification as per Annexure - III

18. GENERAL CONDITIONS

i.	No communication will be sent by the CRAMC, and no correspondence will be entertained in respect of Partners, which are not being selected.
ii.	The selected Partner, on receiving the offer letter from CRAMC, shall submit the hard copies of Letter of acceptance of terms and conditions, undertaking letter, and Undertaking of Fidelity and Secrecy
iii.	The assignment should be conducted in a professional manner and in case of any misconduct & negligence, CRAMC is free to report the matter to SEBI/RBI under the guidelines from time to time. This will be in addition to the disengagement from the assignment.
iv.	By virtue of the engagement, the successful Bidder's team may have access to business information of CRAMC. CRAMC shall at all times have the sole ownership of and the right to use, all such data in perpetuity in the course of performing the Service(s) under the Engagement.
v.	Appointment of Partner shall be purely at the discretion of CRAMC, and no rights whatsoever accrue to the Partner for such appointment.
vi.	Regulatory Compliance: Cloud service provider shall strictly comply with all the requirements laid down in SEBI circular No. SEBI/HO/ITD/ITD_VAPT/P/CIR/2023/ 033, dated March 06, 2023, and any non-compliance of the conditions specified in the said circular will be subject to rejection.
vii.	Partner shall adhere to the coverage strictly as per the scope as may be decided by CRAMC from time to time.
viii.	CRAMC reserves the right to seek views from the entities with whom the Partner is/has been/was associated.
ix	The Partner shall not sub-contract or assign part of the scope of work to any outside Partner or other persons without the express permission in writing from CRAMC.
X	Any other terms and conditions of the assignment would be decided by CRAMC on a case-to-case basis.

19. TENURE OF ASSIGNMENT

— Canara Robeco Asset Management Company Ltd.

CRAMC will appoint the successful bidder for the duration of this specific assignment. The term may be extended, solely at the discretion of CRAMC on satisfactory review of the performance by the Tender Committee.

20. IMPORTANT INFORMATION ABOUT OTHER EXPENSES

- a. No travelling allowance/ halting allowance shall be paid to the bidder for carrying out the assignment.
- b. Payment to the bidders will be exclusive of tax.
- c. The Assignment charges once fixed shall remain unchanged throughout the tenure of the assignment. CRAMC's decision will be final in this regard.

21. CONDUCT & PERFORMANCE MONITORING

- a. CRAMC shall designate one of its senior officers as a single point contact for coordinating the assignment.
- b. CRAMC shall provide requisite initial information of its activities and further support.
- c. CRAMC reserves the right to review the appointment at any point of time and if necessary, to cancel or revoke the appointment by giving 7 days' written notice. If the bidder/applicant is debarred by SEBI / RBI / CAG / BSE / NSE or any government organization during the current assignment period, then with immediate effect the assignment will be terminated. In case of termination of assignment, the remuneration for the incomplete month and the residual period of engagement shall not be payable by CRAMC.
- d. In case the firm fails to report serious omissions/ commissions/ non-compliance / cyber incident etc., CRAMC reserves the right to report the matter to SEBI/ RBI, which may result in appropriate action. Such firms will not be eligible for assignment of any "information-security" related activity with CRAMC for the next five years.
- e. The Bidders are expected to provide an executive summary of observations along with every report and submit the same to the Chief Information Security Officer.

22. REPRESENTATIONS & WARRANTIES

- a. That the Applicant is a Partnership firm/LLP which has the requisite qualifications, skills, experience and expertise in providing Service(s) contemplated hereunder, the financial wherewithal, the power and the authority to enter into the Engagement and provide the Service(s) sought by CRAMC.
- b. That the Applicant is not involved in any major litigation, potential, threatened or existing, that may have an impact of affecting or compromising the performance and

delivery of Service(s) under this Engagement.

- c. That the representations made by the Applicant in its application are and shall continue to remain true and it fulfill all the requirements as are necessary for executing the duties, obligations and responsibilities as laid down in the Engagement and the RFP Documents and unless CRAMC specifies to the contrary, the Applicant shall be bound by all the terms of the RFP.
- d. That the Applicant has the professional skills, personnel and resources/authorizations that are necessary for providing all such services as are necessary to perform its obligations under the application and this Engagement.
- e. That the Applicant shall use such assets of CRAMC as CRAMC may permit for the sole purpose of execution of its obligations under the terms of the RFP or the Engagement. The Applicant shall however, have no claim or right, title, lien or other interest in any such property, and possession of the said property for any duration whatsoever shall not create any right in equity or otherwise, merely by fact of such use or possession during or after the term hereof.
- f. That the Applicant shall procure all the necessary permissions and adequate approvals and licenses for use of various software and any copyrighted process/products free from all claims, titles, interests and liens thereon and shall keep CRAMC, its associates, directors, officers, employees, representatives, consultants and agents indemnified in relation thereto.
- g. That all the representations and warranties as have been made by the Applicant with respect to this RFP and Engagement, are true and correct, and shall continue to remain true and correct throughout the term of the Engagement.
- h. That the execution of the Service(s) herein is and shall be in accordance and in compliance with all applicable laws.
- i. That there are – (a) no legal proceedings pending or threatened against Applicant or any of its partners or its team which adversely affect/may affect performance under this Engagement; and (b) no inquiries or investigations have been threatened, commenced or pending against the Applicant or any of its Partners or its team members by any statutory or regulatory or investigative agencies.
- j. That the Applicant has the corporate power to execute, deliver and perform the terms and provisions of the Engagement and has taken all necessary corporate action to authorize the execution, delivery and performance by it of the Engagement.
- k. That all conditions precedent under the Engagement have been complied.
- l. That neither the execution and delivery by the Applicant of the Engagement nor the Applicant's compliance with or performance of the terms and provisions of the Engagement (i) will contravene any provision of any applicable law or any order, writ, injunction or decree of any court or governmental authority binding on the Applicant

(ii) will conflict or be inconsistent with or result in any breach of any of the terms, covenants, conditions or provisions of, or constitute a default under any agreement, contract or instrument to which the Applicant is a party or by which it or any of its property or assets is bound or to which it may be subject.

23. CONFIDENTIALITY

The Parties agree that they shall hold in trust any Confidential Information received by either Party, under the Engagement, and the strictest of confidence shall be maintained in respect of such Confidential Information. The Parties agree to execute the Confidentiality Agreement prior to finalization of Engagement and shall abide by the terms and conditions of confidentiality as contained therein.

24. GOVERNING LAW

The Engagement shall be governed in accordance with the laws of Republic of India. These provisions shall survive the Engagement.

25. JURISDICTION OF COURTS

The courts of India at Mumbai have exclusive jurisdiction to determine any proceeding in relation to the Engagement. These provisions shall survive the Engagement.

26. TIME LIMIT FOR COMMENCEMENT OF WORK

Time limit for commencement of work shall be mutually decided at the time of award of Engagement.

27. DISCLAIMERS

The information contained in this RFP document or information provided subsequently to Bidders whether verbally or in documentary form by or on behalf of Canara Robeco Asset Management Company Limited (CRAMC), is provided to the Bidder(s) on the terms and conditions set out in this RFP document and all other terms and conditions subject to which such information is provided.

This RFP document is not an agreement and is not an offer or invitation by CRAMC to any parties other than the Bidders who are qualified to submit the applications as per the eligibility conditions. The purpose of this RFP is to provide the Bidder(s) with information to assist in the formulation of their proposals. This RFP does not claim to contain all the information each Bidder may require. Each Bidder Partner should conduct its own investigations and analysis and should check the accuracy, reliability, and completeness of the information in this RFP. CRAMC makes no representation or warranty and shall incur no liability under any law, statute, rules, or regulations as to the accuracy, reliability or completeness of this RFP.

The information contained in the RFP document is selective and is subject to updating, expansion, revision and amendment. It does not purport to contain all the information that

a Bidder may require. CRAMC does not undertake to provide any Bidder with access to any additional information or to update the information in the RFP document or to correct any inaccuracies therein, which may become apparent. CRAMC reserves the right or discretion to change, modify, add or alter any or all of the provisions of this RFP document and / or the selection process, without assigning any reasons, whatsoever. Such change will be intimated to all Bidders. Any information contained in this RFP document will be superseded by any later written information on the same subject made available to all recipients by CRAMC.

CRAMC may in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP.

CRAMC reserves the right to reject any or all expressions of interest / proposals received in response to this RFP document at any stage without assigning any reason whatsoever. The decision of CRAMC shall be final, conclusive, and binding on all the parties.

1. No legal relationship

No binding legal relationship will exist between any of the Bidders and the CRAMC until execution of a contractual agreement with the successful Bidder.

2. Evaluation of Offer

Each Bidder acknowledges and accepts that the Company may, in its absolute discretion, apply any additional criteria it deems appropriate in the selection of the bidder, not limited to those selection criteria set out in this RFP.

3. Disqualification

Any form of canvassing/lobbying/exercise of influence/cartelization etc. by the Bidder will result in disqualification of such Bidder.

In case it is found during the course of the transaction or at any time before award of the assignment or after its execution and during the period of subsistence or after the period thereof, that one or more of the terms and conditions laid down in this Request for Proposal has not been met by the Bidder, or the Bidder has made material misrepresentation or has given any materially incorrect or false information, the Bidder shall be disqualified forthwith if not yet appointed as the **MTP (Marketing Technology Partner)**. Also, if the Selected Bidder has already been appointed as the MTP, as the case may be, the same shall, notwithstanding anything to the contrary contained in this RFP, be liable to be terminated, by a communication in writing by the CRAMC to the Selected Bidder without the CRAMC being liable in any manner whatsoever to the MTP. This action will be without prejudice to any other right or remedy that may be available to the CRAMC under the bidding documents, or otherwise. However, before terminating the assignment, a show cause notice stating why its appointment should not be terminated would be issued giving it an opportunity to explain its position.

4. Confidentiality

The information contained in this document is confidential. The Bidder shall not share this information with any other party not connected with responding to this RFP. The information contained in this RFP or subsequently provided to Bidder(s) whether verbally or in writing by or on behalf of the CRAMC shall be subject to the terms and

conditions set out in this RFP and any other agreement/contract to be executed by the CRAMC.

5. No representation or warranty by the CRAMC

The CRAMC makes no representation or warranty and shall incur no liability under any law, statute, rules, or regulations on any claim the potential bidder may make in case of failure to understand the terms and requirements of this RFP and responds to the RFP.

The CRAMC may, in its absolute discretion, but without being under any obligation to do so, update, amend or supplement the information in this RFP and specify additional requirements or cancel this RFP at any time without assigning any reason there of and without any notice, at its sole discretion. All such changes or events will be uploaded on the CRAMC's website at www.canararobeco.com. Interested parties are advised to regularly refer to the URL mentioned above.

While due care has been taken in the preparation of this document, the CRAMC will not be held responsible for any inaccuracy in the information provided herein. The Bidder must apply its own care and conduct its own investigation and analysis regarding any information contained in the RFP document and the meaning and impact of all such information contained in the RFP.

It is the Bidder's responsibility to examine this RFP; examine all other information available on reasonable inquiry relevant to the risks, contingencies and circumstances affecting its response to the RFP; and satisfy itself as to the completeness, correctness, and sufficiency of all the information contained in its response to the RFP.

6. CRAMC's Discretion

- a. The CRAMC may at its sole discretion select and appoint such number of bidders as it deems fit with requisite experience in BFSI sector, comply with the SEBI Guidelines/Regulations, other internal evaluation parameters
 - i. The CRAMC shall be under no obligation to act upon the advice rendered by the bidders for the appointment of the MTP (Marketing Technology Partner). The appointment made by the CRAMC shall be final and binding on all the Bidders.
 - ii. In case, if there is substantial change in the composition of the Team handling the Cloud Project of the MTP which can significantly affect its execution, the CRAMC reserves its right to penalize the MTP, the proposed rate of penalty would be 0.5% of the entire project cost/TCO per week of delay or non-compliance.

ANNEXURE I

Compliance Requirements (on the letter head of the Partner)

Note: The Bidder should mention in seriatim, whether all the compliance are met by marking their responses as 'Y'(Yes) or 'N'(No).

Cloud Security Assessment Checklist

Introduction

Due diligence while onboarding a cloud vendor is an important step in ensuring that there is no change in the security posture of the Mutual Fund as the vendor will be dealing with business/customer sensitive information protecting which is paramount duty of the Mutual Fund. It is imperative to consider various factors including adherence to industry recognized certifications, rigorous security assessments etc., while onboarding new vendor for the purpose. This document was created with an intent to provide comprehensive list of cloud security considerations as a checklist to be ensured before onboarding a new cloud vendor.

Abbreviation	Definition/Expansion
Partner	MTP (Marketing Technology Platform) Deployment Partner
OEM	Original Equipment Manufacturer
MEITY	Ministry of Electronics and Information Technology
DPDP	Digital Personal Data Protection Act
CSA	Cloud Security Alliance

Assessment Checklist and

Before onboarding any new cloud vendor, we recommend that the best practices are considered as per various sections of this document.

Refer the Annexure 1 – CSAC under Technical Evaluation Document.

ANNEXURE II

Application format for Procurement of Full-Stack Next Gen Marketing Technology Platform enabled with CDP (Customer Data Platform) (on the letter head of the Partner)

Ref. No.

Date:

To,
The Head – Digital Business & Products,
Canara Robeco Asset Management Company Ltd
4th Floor, Construction House,
No.5 Walchand Hirachand Marg, Ballard Estate, Mumbai 400001

Sub: Providing Preliminary Information for procurement of Full-Stack Next Gen Marketing Technology Platform enabled with CDP (Customer Data Platform) for Canara Robeco Asset Management Company Ltd.

Dear Sir,

In respect of the procurement of Full Stack Next Gen Marketing Technology Platform enabled with CDP for Canara Robeco Asset Management Company Limited, please find enclosed our response to your RFP dated _____

Having examined the RFP document and the Scope, Eligibility Criteria and other terms and conditions as stipulated therein, we, the undersigned, hereby state that we are in conformity with the specified requirements and would like to offer to provide the Services as defined and described in the RFP, on the terms and conditions mentioned in the RFP Document.

1. We certify that all the information and representations furnished herewith are true, correct, valid and subsisting in every respect and can be supported with relevant documents of proof on demand by CRAMC.
2. We are submitting the application for preliminary evaluation and appointment of our Partner for the procurement of Full Stack Next Gen Marketing Technology Platform enabled with CDP with regards to Canara Robeco Asset Management Company Ltd and Canara Robeco Mutual Fund and other incidental assignments along with the audit scope.
3. We agree and undertake that if our Partner is shortlisted for technical and commercial bidding, we shall comply with the same and undertake assignment as provided by CRAMC SPOC.
4. We agree that 1 bidder will be shortlisted for this activity for a period of 3 years, and we accept that the scope of work, Technical & Functional specifications for the same will be limited to the categories provided in this RFP.

— Canara Robeco Asset Management Company Ltd.

5. If the assignment is awarded to our Partner, we agree and undertake to provide the Services comprised in the scope within the timeframe specified, starting from the date of receipt of notification of award from CRAMC.
6. We agree and undertake to abide by the terms and conditions, provisions, stipulations, and covenants from time to time and it shall remain binding upon us and may be accepted at any
7. We understand that you are not bound to accept our request for participation in the process or not bound to accept our proposals that you may receive or give any reason for rejection of any application. We also agree and confirm that we will not claim any expenses incurred by us in preparing and submitting this proposal.
8. We are also aware that CRAMC has also right to re-issue / re-commence or completely cancel the selection process, to which we do not have right to object and have no reservation in this regard; the decision of CRAMC in this regard shall be final, conclusive, and binding upon us.
9. We are also aware that in an event of non-performance CRAMC has also right to re-issue / re-commence the selection process, to which we do not have right to object and have no reservation in this regard; the decision of CRAMC in this regard shall be final, conclusive, and binding upon us.
10. The complete set of documents, information about our Partner, and clients etc. are enclosed hereto and shall form part of this application.
11. We enclose herewith our Partner's profile (as per the prescribed format attached) for your perusal.
12. I/We further declare and confirm that if the assignment is awarded to me/us, it would not result in any conflict of interest either with CRAMC or its Employees, CRMF or its trustees.

I / We confirm that the information furnished here is true to the best of my knowledge.

Thanking you,

Yours faithfully,
Name of the Signatory

Encl: As above

NOTE:

- 1) All mandatory information requested for as per point No. 2.0 of the RFP should be submitted along with the technical evaluation.
- 2) Incomplete applications and / or applications not in the prescribed format may be rejected without any further reference.

ANNEXURE III

Letter of confirmation regarding non-disqualification (to be submitted on letterhead)

Ref. No.

Date:

To,

The Head – Digital Business & Products,
Canara Robeco Asset Management Company Ltd
4th Floor, Construction House,
No.5 Walchand Hirachand Marg, Ballard Estate,
Mumbai 400001.

Dear Sir,

With reference to your letter No. _____ dated _____, I/we confirm as follows:

-

- i) I am/ Any of our partners is not an officer/employee of your company.
- ii) I am/ Any of our partners is not a partner or in employment of any office or employee of your company.
- iii) I am/ Any of our partners or Associates firms or sister concern or Branch office, is not assigned with any ongoing information security activity for your company.
- iv) I am/ We are not otherwise disqualified from SEBI, RBI, Canara Bank and its associates and subsidiaries.
- v) I/ We also confirm that I am/we are a full-time practicing information security firm and am/are not employed elsewhere and do not have any other business interest.
- vi) I/ We also confirm that I/ we will not be disqualified during the course of the assignment for any of the reasons mentioned above.
- vii) I/ We undertake not to subcontract any activity mentioned in the SOW assigned to me/us to any outsider without the express consent from CRAMC.

Yours faithfully,

Name of Signatory