

**SECP Tender # 29/13-14**

**DESIGNING, DEVELOPMENT AND DEPLOYMENT OF INVESTOR EDUCATION WEB PORTAL**

**PRE-BID MEETING (17-6-2014)**

**Response to the queries raised during pre-bid meeting dated 17.06.2014 and emails received prior to pre-bid meeting.**

	Query	SECP Response
1)	The features of web applications as provided are generic; will SECP give specific requirements?	<p>The bidder has to provide features of each application with the bid documents based on the understanding of the investor education program and financial market.</p> <p>However <u>as a reference</u>, only (should not be considered as requirements) <b><i>list of web links from local and international jurisdictions having such web applications is given below.</i></b> Please note that the proposed features should be compatible with local market, economic and social environment.</p>
2)	Please clarify the language to be used?	Web portal, its mobile application will be in English only. However, other mobile applications need to be developed both in English and Urdu.
3)	Text to be displayed under subsections on the web portal shall be hardcoded OR shall come from some text files OR a content management interface is required.	A content management interface is required here so that content Addition/Update/Removal can be done easily
4)	Does designing of social media pages include social media advertisements?	The requirements pertain to development of Facebook, LinkedIn and Twitter pages only. It does not include advertisement component of any sort
5)	Service Desk  Will the assigned user respond to the request from outside	The system will include both emails and telephony requests in respect of queries and

	system (through email or Call) OR a simple interface is required to respond from the system (which will be emailed to the investor?)	complaints submitted to SECP. However integration will be required in the initial phase for transfer of data.
6)	Mutual Funds and Insurance Demonstrator To provide an estimated growth on an investment in a particular mutual fund, system needs to have NAV. Will NAV be fetched from any external system /site OR Admin will insert the NAV of all mutual funds in the system. Similarly to provide an estimated claim amount , system needs to have the historical data stored in the system	Demo data can be added to educate the features of the product and class. Different scenarios can be made for educating the public
7)	Trading –Simulation: What asset classes’ needs to be covered?	Equity Market
8)	Trading Competition What will be the basis of competition and ranking? How rankings will be computed (based on Capital Gain on investments?	Rating should be based upon overall ROI on an investment portfolio.
9)	Shall SECP Exchange be used for Email Accounts OR Vendor needs to buy the Office365 email accounts?	SECP exchange will not be used. vendor needs to buy a separate email accounts
10)	Will the service provider be responsible for (a) SMS application development / integration? and (b) branding / visual design theming of various social media pages? Please specify social media pages	a) Integration is required only b) Already mentioned in the bidding document
11)	a) Will a mobile application be developed for the web portal? b) If yes, please specify the platforms and devices for mobile application of the web portal?	a) Yes, the mobile application of the web portal is required b) Mobile apps should be developed for IOS and Android platforms and must support the latest OS versions
12)	Who will be responsible for copywriting and development of textual content in both English and Urdu language?	Supplier will be responsible
13)	Design Guidelines  Adobe Flash technology is not compatible with web browsers on all mobile devices; therefore animations in this technology will not meet various HTML standards.	Selection of technology used for animation should be in compliance with HTML standards.
14)	Games and animations on the portal:  a) How many Flash-based games will be required? b) how many native mobile app games will be required and what will be their scope, and on what mobile	a) The bidder may provide basic, intermediate and advance level games in accordance with Investor education objectives.

	platforms ?	b) Mobile Applications of above games will also be required and will be made available on Android and IOS
15)	<p>Miscellaneous</p> <ol style="list-style-type: none"> <li>1) Expected Number of Customers?</li> <li>2) Centralized database with Service Oriented Architecture?</li> <li>3) Will the same web application be made available on different web browser?</li> <li>4) Web browser compatibility – any specific browser and version or cross browser compatibility.</li> <li>5) Stock Exchange Simulator will be a separate application?</li> <li>6) Webinar will be a separate application?</li> <li>7) What kind of reporting is required?</li> </ol>	<ol style="list-style-type: none"> <li>1) It is expected that there could be upto 100,000 concurrent users.</li> <li>2) Should be well structured database and shall follow database best practices.</li> <li>3) There is no such restriction. However deliverable(s) should be in compliance with all platforms</li> <li>4) Already mentioned in “Design guidelines” section</li> <li>5) Yes</li> <li>6) Yes</li> <li>7) Comprehensive reporting module is required</li> </ol>

**LIST OF WEB LINKS FROM LOCAL AND INTERNATIONAL JURISDICTIONS FOR VARIOUS WEB APPLICATIONS (AS MENTIONED ABOVE IN S.NO. 1)**

**(FOR REFERENCE ONLY)**

<a href="http://www.getsmarteraboutmoney.ca">www.getsmarteraboutmoney.ca</a>
<a href="http://www.asx.com.au">www.asx.com.au</a>
<a href="https://www.moneysmart.gov.au/">https://www.moneysmart.gov.au/</a>
<a href="http://www.finra.org/">http://www.finra.org/</a>
<a href="https://knowrisk.com.au/">https://knowrisk.com.au/</a>
<a href="http://www.sebi.gov.in/sebiweb/">http://www.sebi.gov.in/sebiweb/</a>
<a href="http://www.optionseducation.org/en.html">http://www.optionseducation.org/en.html</a>
<a href="http://www.360financialliteracy.org/">http://www.360financialliteracy.org/</a>
<a href="http://www.buildingfuturesnetwork.com/">http://www.buildingfuturesnetwork.com/</a>
<a href="http://www.choosetosave.org/">http://www.choosetosave.org/</a>
<a href="http://www.fcac-acfc.gc.ca/Eng/Pages/home-accueil.aspx">http://www.fcac-acfc.gc.ca/Eng/Pages/home-accueil.aspx</a>
<a href="http://www.investopedia.com/corp/contactus.aspx">http://www.investopedia.com/corp/contactus.aspx</a>
<a href="http://understandinsurance.com.au/">http://understandinsurance.com.au/</a>
<a href="http://www.cfawebcasts.org/pages/login.aspx?ReturnUrl=%2fpages%2fsplash.aspx%3f">http://www.cfawebcasts.org/pages/login.aspx?ReturnUrl=%2fpages%2fsplash.aspx%3f</a>
<a href="http://www.iiroc.ca">http://www.iiroc.ca</a>
<a href="http://www.kcdr.org/">http://www.kcdr.org/</a>

<a href="http://www.mohtasib.gov.pk/gop/index.php?q=aHR0cDovLzE5Mi4xNjguNzAuMTM2L3dhZmFxaW1vaC8%3D">http://www.mohtasib.gov.pk/gop/index.php?q=aHR0cDovLzE5Mi4xNjguNzAuMTM2L3dhZmFxaW1vaC8%3D</a>
<a href="http://www.kse.com.pk/">http://www.kse.com.pk/</a>
<a href="http://www.ublfunds.com.pk/">http://www.ublfunds.com.pk/</a>
<a href="http://www.mufap.com.pk/">http://www.mufap.com.pk/</a>
<a href="http://www.statelife.com.pk/">http://www.statelife.com.pk/</a>
<a href="http://www.pii.com.pk/">http://www.pii.com.pk/</a>
<a href="http://www.cdcpakistan.com/">http://www.cdcpakistan.com/</a>
<a href="http://www.iap.net.pk/">http://www.iap.net.pk/</a>
<a href="http://www.pmx.com.pk/">http://www.pmx.com.pk/</a>
<a href="http://www.secp.gov.pk/">http://www.secp.gov.pk/</a>
<a href="http://50.73.141.58/invest-wisely/">http://50.73.141.58/invest-wisely/</a>
<a href="http://www.secp.gov.pk/about_secp.asp">http://www.secp.gov.pk/about_secp.asp</a>
<a href="http://50.73.141.58/invest-wisely/">http://50.73.141.58/invest-wisely/</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/budgeting/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/budgeting/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/financial-planning/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/financial-planning/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/getting-advice/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/getting-advice/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/investing-basics/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/investing-basics/Pages/default.aspx</a>
<a href="http://www.iirc.ca/investors/investoreducation/Pages/How-to-Invest.aspx">http://www.iirc.ca/investors/investoreducation/Pages/How-to-Invest.aspx</a>
<a href="https://knowrisk.com.au/myrisk">https://knowrisk.com.au/myrisk</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/retirement-planning/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/retirement-planning/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/saving-money/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/saving-money/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/understanding-tax/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/managing-your-money/planning/understanding-tax/Pages/default.aspx</a>
<a href="http://www.getsmarteraboutmoney.ca/en/life-events/Pages/default.aspx">http://www.getsmarteraboutmoney.ca/en/life-events/Pages/default.aspx</a>
<a href="http://www.fcac-acfc.gc.ca/Eng/forConsumers/lifeEvents/Pages/home-accueil.aspx">http://www.fcac-acfc.gc.ca/Eng/forConsumers/lifeEvents/Pages/home-accueil.aspx</a>
<a href="#">Added from Financial Consumer agency of Canada</a>
<a href="https://www.360financialliteracy.org/Life-Stages">https://www.360financialliteracy.org/Life-Stages</a>
<a href="http://www.asx.com.au/education/shares-courses.htm">http://www.asx.com.au/education/shares-courses.htm</a> )
<a href="http://www.cdcpakistan.com/Downloads/General%20Guidelines%20to%20open%20Investor%20Account%20-%20Individual.pdf">http://www.cdcpakistan.com/Downloads/General%20Guidelines%20to%20open%20Investor%20Account%20-%20Individual.pdf</a>
<a href="http://www.kse.com.pk">www.kse.com.pk</a>
<a href="http://www.pmx.com.pk">http://www.pmx.com.pk</a>
<a href="http://mufap.com.pk/pdf/WRMF.pdf">http://mufap.com.pk/pdf/WRMF.pdf</a>
<a href="http://www.mufap.com.pk/investor.php?tab=link4">http://www.mufap.com.pk/investor.php?tab=link4</a>
<a href="http://www.optionseducation.org/seminars_events/all_seminars/seminar_event_descriptions.html">http://www.optionseducation.org/seminars_events/all_seminars/seminar_event_descriptions.html</a>
<a href="http://www.optionseducation.org/seminars_events/all_seminars.html">http://www.optionseducation.org/seminars_events/all_seminars.html</a>

<a href="http://www.mohtasib.gov.pk">http://www.mohtasib.gov.pk</a> <a href="http://www.kcdr.org/">http://www.kcdr.org/</a> <a href="https://www.moneysmart.gov.au/managing-your-money/managing-debts/problems-paying-your-mortgage/missed-a-mortgage-repayment#options">https://www.moneysmart.gov.au/managing-your-money/managing-debts/problems-paying-your-mortgage/missed-a-mortgage-repayment#options</a>
<a href="http://www.secp.gov.pk/ID/id_registeredentities.asp">http://www.secp.gov.pk/ID/id_registeredentities.asp</a> <a href="http://www.secp.gov.pk/SCD/pub_scd/pdf/LICENSED_ENTITIES.pdf">http://www.secp.gov.pk/SCD/pub_scd/pdf/LICENSED_ENTITIES.pdf</a> <a href="http://www.secp.gov.pk/SMD/smd_brkr_agnt.asp">http://www.secp.gov.pk/SMD/smd_brkr_agnt.asp</a> )
<a href="http://www.investopedia.com/articles/">http://www.investopedia.com/articles/</a> <a href="http://www.asx.com.au/education/download-brochures.htm">http://www.asx.com.au/education/download-brochures.htm</a> <a href="http://www.finrafoundation.org/resources/education/learning/">http://www.finrafoundation.org/resources/education/learning/</a> <a href="http://www.optionseducation.org/tools/faq.html">http://www.optionseducation.org/tools/faq.html</a>
<a href="http://www.getsmarteraboutmoney.ca/tools-and-calculators/quizzes/">http://www.getsmarteraboutmoney.ca/tools-and-calculators/quizzes/</a>
<a href="http://www.irvex.ir">http://www.irvex.ir</a> <a href="http://www.investopedia.com/simulator/home.aspx">http://www.investopedia.com/simulator/home.aspx</a> <a href="https://www.optionseducation.org/login_or_register/login.html?resource=%2Ftools%2Fvirtual_trading_system.html&amp;\$\$login\$\$=%24%24login%24%24">https://www.optionseducation.org/login_or_register/login.html?resource=%2Ftools%2Fvirtual_trading_system.html&amp;\$\$login\$\$=%24%24login%24%24</a>
<a href="https://www.moneysmart.gov.au/tools-and-resources/calculators-and-tools/managed-funds-calculator">https://www.moneysmart.gov.au/tools-and-resources/calculators-and-tools/managed-funds-calculator</a>
<a href="http://understandinsurance.com.au/calculators">http://understandinsurance.com.au/calculators</a>
<a href="https://knowrisk.com.au/tracker/login">https://knowrisk.com.au/tracker/login</a>
<a href="https://www.moneysmart.gov.au/borrowing-and-credit/borrowing-basics/using-comparison-websites#shopping">https://www.moneysmart.gov.au/borrowing-and-credit/borrowing-basics/using-comparison-websites#shopping</a>
<a href="http://www.ublfunds.com.pk/international/risk-profiler/">http://www.ublfunds.com.pk/international/risk-profiler/</a> )
<a href="http://www.asx.com.au/education/sharemarket-games.htm">http://www.asx.com.au/education/sharemarket-games.htm</a> <a href="https://www9.asx.com.au/smg/school-game-rules.htm">https://www9.asx.com.au/smg/school-game-rules.htm</a> <a href="http://min.com.my/games/kids-and-cash">http://min.com.my/games/kids-and-cash</a> )
<a href="http://www.investopedia.com/simulator/game/">http://www.investopedia.com/simulator/game/</a>
<a href="https://www.moneysmart.gov.au/tools-and-resources/calculators-and-tools/mobile-apps">https://www.moneysmart.gov.au/tools-and-resources/calculators-and-tools/mobile-apps</a> <a href="https://knowrisk.com.au/insurance-tracker">https://knowrisk.com.au/insurance-tracker</a>
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<a href="http://www.asx.com.au/education/seminars-webinars.htm">http://www.asx.com.au/education/seminars-webinars.htm</a>
<a href="http://www.asx.com.au/education/seminars-webinars.htm">http://www.asx.com.au/education/seminars-webinars.htm</a>
<a href="http://www.secp.gov.pk/servicedesk/index.asp">http://www.secp.gov.pk/servicedesk/index.asp</a> )

[http://www.getsmarteraboutmoney.ca/en/tools\\_and\\_calculators/videos/Pages/default.aspx?group=Funny%20money](http://www.getsmarteraboutmoney.ca/en/tools_and_calculators/videos/Pages/default.aspx?group=Funny%20money)).

<http://www.asx.com.au/education/investment-videos-2013.htm>

<http://www.cfawebcasts.org/pages/index.aspx>

<http://education.optionseducation.org/course/?podcasts=1>

<http://podgallery.org/finra-compliance-podcasts/>

<http://www.finra.org/Investors/SmartInvesting/GettingStarted/Podcasts/p123287>

<https://www.360financialliteracy.org/Tools/Polls>

<http://www.getsmarteraboutmoney.ca/tools-and-calculators/quizzes/>

[http://www.getsmarteraboutmoney.ca/en/tools\\_and\\_calculators/calculators/Pages/AllCalculators.aspx](http://www.getsmarteraboutmoney.ca/en/tools_and_calculators/calculators/Pages/AllCalculators.aspx))

<http://www.choosetosave.org/calculators/>

<http://www.360financialliteracy.org/Tools/Calculators>

<http://www.buildingfuturesnetwork.com/page.php?id=EGEN04>

[http://www.optioneducation.net/calculator/main\\_calculator.asp](http://www.optioneducation.net/calculator/main_calculator.asp)

<https://www.moneysmart.gov.au/tools-and-resources/calculators-and-tools/budget-planner>