

Tech Stack

The software layers a small fund needs — CRM, data room, portfolio monitoring, LP reporting — and a realistic first-year budget.

Overview

A two-person fund does not need enterprise software. It needs five things that talk to each other: a deal CRM, a document store, an LP record, a portfolio tracker and a way to send reports. Buy those, and resist everything else until a real bottleneck appears.

The five layers

- Deal CRM — pipeline stages, sourcing attribution, meeting notes, and follow-up reminders.
- Data room and document store — one structured repository for diligence, signed documents and board packs.
- LP CRM and reporting — commitments, capital accounts, notices, and a portal or a disciplined email cadence.
- Portfolio monitoring — a standard monthly metric template collected from every company.
- Fund accounting — usually owned by the administrator; you need read access, not a licence.

Selection principles

- Prefer one tool that does 80% of two jobs over two tools that need syncing.
- Own your data: exportability matters more than features on a five-year horizon.
- Do not buy an LP portal before you have twenty LPs; a well-formatted quarterly PDF outperforms an empty portal.
- Standardise the portfolio metric template before choosing a monitoring tool — the template is the hard part.

First-year budget

- CRM: ₹0–1.5 lakh a year for a two-person team.
- Document store and e-signature: ₹0.5–1.5 lakh a year.
- Portfolio monitoring: ₹0–3 lakh a year; a spreadsheet is genuinely acceptable below 15 companies.
- Website, email and security tooling: ₹1–2 lakh a year.

- Total realistic spend: under ₹8 lakh a year before headcount.

Security baseline

- SSO and enforced two-factor authentication across every tool holding LP or portfolio data.
- Role-based access to the data room, reviewed when anyone leaves.
- Encrypted backups of signed documents held outside the primary vendor.
- A written incident response contact list, tested once a year.

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