MODEL CONTEXT PROTOCOL · HOSTED CONNECTOR

India Wealth Desk

Read-only market intelligence for Indian wealth advisors

A hosted, **read-only** connector that gives Claude free, **India-native, end-of-day** market data — NSE prices, AMFI fund NAVs, public fundamentals, indices, FII/DII flows, breadth, corporate actions and more — and assembles client-ready morning briefings. It **informs advice; it never places it.** No client names or account numbers pass through it — only instruments and weights.

12 READ-ONLY TOOLS | NSE · AMFI · SCREENER | END-OF-DAY | HOSTED IN MUMBAI | CLAUDE + MCP

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1. What it is & what it achieves

An advisor opens Claude and simply asks — *"how did the market close, and build me a morning note for this client's holdings"* — and gets a grounded, India-native answer. The connector hands Claude the structured market data it otherwise can't reach; Claude does the reasoning and the writing.

- **One question, a full picture.** Prices, fund NAVs, fundamentals, index & sector moves, FII/DII flows, market breadth, corporate actions, results dates, bulk/block deals and 52-week extremes — all India-native, all free.
- **A client-ready morning briefing in seconds** — exposure-weighted, with a market-context header, one-line views per holding, and a proactive question — drafted for the advisor to review and send.
- **Advisor-grade, not trader-grade.** End-of-day data for judgement and client conversations — not a live trading terminal.
- **Safe by construction.** Read-only, no transaction surface, and no client identity ever leaves the desk.

> ✓ The decision, and the order, always stay with the human. This tool **informs** advice — it never places it.

2. Connect in four steps

It is a **hosted** connector — nothing to install on a server. Each advisor points Claude Desktop at the public URL. **No API key is needed** (keyless access is enabled).

1. **Install the basics.** Claude Desktop (claude.ai/download) and Node.js LTS (nodejs.org) — Node powers the small `mcp-remote` bridge.
2. **Open the config.** Claude Desktop → **Settings** → **Developer** → **Edit Config**. Windows: `%APPDATA%\Claude\claude_desktop_config.json` · macOS: `~/Library/Application Support/Claude/claude_desktop_config.json`
3. **Add the connector** inside `mcpServers` (paste the block below; if you already have servers, add it alongside).
4. **Restart Claude Desktop** fully (Quit from the tray, reopen). First launch takes ~10–20s while Node fetches the bridge. The 12 tools then appear in any chat.

```json
{
  "mcpServers": {
    "india-wealth-desk": {
      "command": "npx",
      "args": ["-y", "mcp-remote", "https://wealthdesk.wealthwisers.in/mcp"]
    }
  }
}
```

Verify it is live any time by opening **https://wealthdesk.wealthwisers.in/health** in a browser — it reports status and cache freshness. Then ask in plain English; Claude picks the right tools.

> ⚙ On Windows, if Claude cannot find npx, change `"command": "npx"` to `"command": "cmd"` and prefix the args with `"/c", "npx"`. A browser tab may open on first run (the bridge probing for OAuth) — close it; keyless access still connects.

3. The twelve tools

Every tool is **read-only** and **end-of-day**. You never call them by hand — describe what you want and Claude selects them. Optional parameters show their default.

Equities NSE BHAVCOPY · PUBLIC SCREENER SWEEP

TOOL	WHAT IT RETURNS
`get_stock_history` `(symbol, days=30)`	Last ~N trading days of EOD OHLCV for an NSE symbol, with month-change and 30-day high/low. READ-ONLY
`get_company_financials` `(symbol)`	Fundamentals — P/E, P/B, ROE, debt/equity, revenue & profit growth, promoter holding — from a quarterly public-Screener sweep. READ-ONLY

Mutual funds MFAPI.IN · AMFI DATA

TOOL	WHAT IT RETURNS
`search_fund` `(query)`	Up to 8 matching `{scheme_code, scheme_name}` — use to find a fund's code by name. READ-ONLY
`get_fund_nav` `(scheme_code, history_days=30)`	Latest NAV, recent history and month-change for a scheme. READ-ONLY

Market context NSE INDICES · FII/DII · BHAVCOPY

TOOL	WHAT IT RETURNS
`get_index_levels` `()`	Nifty 50, key sector indices and India VIX — close and % change. READ-ONLY
`get_fii_dii_flows` `()`	Net FII/FPI and DII cash-market flows (₹ crore) — who was buying or selling. READ-ONLY
`get_market_breadth` `()`	Advances vs declines across all NSE EQ stocks, plus the advance/decline ratio. READ-ONLY

Events, actions & flows NSE

TOOL	WHAT IT RETURNS
`get_corporate_actions` `(symbol="")`	Upcoming/recent dividends, splits, bonus and rights with ex-dates; optionally filter to one symbol. READ-ONLY
`get_results_calendar` `(symbol="")`	Upcoming board-meeting / results (earnings) dates; optionally filter to one symbol. READ-ONLY
`get_bulk_block_deals` `()`	Latest-day bulk & block deals — client name, side, quantity and price. READ-ONLY
`get_52week_highs_lows` `()`	Stocks hitting a new 52-week high or low on the latest trading day. READ-ONLY

Client briefing META-TOOL · BUNDLES ALL OF THE ABOVE

TOOL	WHAT IT RETURNS
`morning_briefing` `(holdings)`	A single exposure-weighted payload for one client — a market-context header plus price + fundamentals (stocks) or NAV trend (funds) per holding, banded HIGH / MED / LOW. Pass `holdings` as `[{type, id, weight_pct}]` — instruments and weights only, never client identity. READ-ONLY

Example — a morning briefing

```
morning_briefing(holdings=[
  {"type": "stock", "id": "INFY",      "weight_pct": 25},
  {"type": "stock", "id": "SUNPHARMA", "weight_pct": 18},
  {"type": "stock", "id": "HDFCBANK",  "weight_pct": 15},
  {"type": "fund",  "id": "120503",    "weight_pct": 30}
])
```

In plain English: *"Build a morning briefing for a client holding INFY 25%, SUNPHARMA 18%, HDFCBANK 15%, and scheme 120503 at 30%."* Claude returns the bundle and writes a <150-word, client-ready note with one-line views and a proactive question. The advisor reviews, adds judgement, and sends.

4. The prompt library — getting the most from the desk

You never call tools by hand — you describe the job and Claude selects and chains them. These prompts are organised by what an advisor actually needs to do. Mix and match freely: a single request can combine several tools, and you can always ask for the answer as a **client-ready note** rather than raw data.

The morning market read — `get_index_levels` · `get_fii_dii_flows` · `get_market_breadth` · `get_52week_highs_lows`

Start the day with the whole tape in five lines.

> “ Give me today's India market close in five lines: Nifty and the main sectors, India VIX, FII/DII flows, and market breadth — then one sentence on the overall tone.

> “ How broad was today's move? Use advances vs declines and tell me which sectors led and which lagged.

> “ Did FIIs and DIIs agree or diverge today, and what does that imply about who's supporting the market?

> “ Summarise today's market for a client WhatsApp broadcast in under 60 words, citing that figures are end-of-day.

Single-stock 360° — `get_stock_history` · `get_company_financials` · `get_corporate_actions` · `get_results_calendar`

Everything on one name before a client call — in a single ask.

> “ Give me a full read on INFY: one-month price trend, latest fundamentals, the next results date, and any pending corporate actions.

> “ I'm meeting a client who holds TATAMOTORS — prep three talking points from its price action and fundamentals, plus one risk to flag.

> “ Does RELIANCE have any ex-dividend, bonus or split coming up, and when does it next report?

> “ Has HDFCBANK looked cheap or expensive lately — combine its month price trend with its current valuation multiples.

Valuation & quality comparisons — `get_company_financials`

Side-by-side fundamentals across the names you cover.

> “ Compare INFY, TCS and WIPRO on P/E, ROE and revenue growth, and tell me which screens best on quality.

> “ Compare the three large private banks — HDFCBANK, ICICIBANK, SBIN — on P/E, P/B, ROE and growth, and rank them.

> “ From the names I cover (give a list), flag any with high debt-to-equity or slowing profit growth.

Mutual fund research — `search_fund` · `get_fund_nav`

Find a scheme and read its recent NAV without leaving the chat.

> “ Find the Parag Parikh Flexi Cap direct-growth fund and show its recent NAV trend.

> “ My client holds scheme 120503 — how has its NAV moved over the last month?

> Search 'HDFC small cap', get the direct-growth scheme's latest NAV and one-month change, and tell me if it's been volatile.

> Find two ELSS funds I'm considering for a client and put their recent NAV trends side by side.

The client morning briefing — `morning_briefing`

The flagship. Pass instruments and weights only — never the client's name or account.

> Build a morning briefing for a client holding INFY 25%, SUNPHARMA 18%, HDFCBANK 15%, and scheme 120503 at 30%.

> Morning note for a conservative client: HINDUNILVR 20%, ITC 20%, HDFCBANK 15%, and debt funds at 45% — keep the tone calm and brief only the HIGH and MED weights.

> Briefing for an aggressive, midcap-heavy portfolio — focus on the top weights and flag any concentration risk.

> Turn that briefing into a 100-word WhatsApp message: name sectors and holdings but not the client, and note the figures are EOD.

> After the briefing, draft one proactive question I can ask this client to open a portfolio-review conversation.

Sector & thematic reads — `get_index_levels` · `get_market_breadth` · `get_company_financials`

Turn index moves into a view for sector-tilted portfolios.

> How did IT close today versus the Nifty, and what's the read for IT-heavy portfolios?

> Pharma vs FMCG today — which was more defensive, and does that fit the current risk tone?

> Build a sector scorecard from today's index moves, ranked best to worst, with one line on the standout.

> Bank Nifty vs the Financial Services index today — any divergence worth noting for a banking-heavy book?

Events, results & corporate actions — `get_results_calendar` · `get_corporate_actions`

Never be surprised by an ex-date or an earnings print.

> Who reports earnings this week? Flag any names a typical large-cap portfolio would hold.

> List upcoming ex-dividend dates over the next two weeks so I can remind the relevant clients.

> Cross-check INFY, ICICIBANK and MARUTI against the results calendar and tell me what's reporting and when.

> Any bonus, split or rights issues coming up that clients should know about?

Flows & smart-money color — `get_fii_dii_flows` · `get_bulk_block_deals` · `get_52week_highs_lows`

See where the big money moved and which names are at extremes.

> Were there large bulk or block deals today, in which names, and who was on the buy side?

> “ Show today's FII/DII flows and frame whether domestic money is cushioning any foreign selling.

> “ Which stocks hit new 52-week highs and lows today — anything relevant to the names I cover?

> “ Do any of my client's holdings (give the list) appear in today's bulk/block deals or 52-week lists?

Risk & positioning – `get_index_levels (India VIX)` · `get_market_breadth` · `get_fii_dii_flows`

Read the weather before you talk to a nervous client.

> “ Read me the current risk environment: India VIX level and direction, market breadth, and FII flows — is this a risk-on or risk-off tape?

> “ Should I be reassuring or cautious with clients today? Base it on VIX, breadth and flows, end-of-day.

> “ Frame today's volatility for a nervous client in two calm sentences, without jargon.

Pair the desk with Claude's own web access – `any tool + Claude web search`

The connector gives the numbers; Claude adds the "why" from current news. This is where it shines.

> “ INFY fell this month per the connector — use your web access to tell me why, then give me a one-line explanation I can give a client.

> “ Pharma led today; take the connector's sector data and add the likely news catalyst from the web.

> “ FIIs sold heavily today — show the connector's number, then add the macro reason from current headlines.

> “ Build a morning briefing, then enrich each HIGH-priority holding with one current news headline from the web.

Power-user patterns — phrasing that gets the most out of the desk

- **Chain tools in one ask.** "Price trend, fundamentals and next results date for X" — Claude fetches all three and synthesises.
- **Say what you want back.** Ask for a "client-ready note", a "WhatsApp message", "three talking points", or "just the raw numbers".
- **Invite the web for news.** The desk is data, not news — say "use your web access for the why" to combine both.
- **Name the risk profile.** "Conservative client" or "aggressive book" tunes the tone and what gets emphasised.
- **Cite freshness to clients.** Ask Claude to state the as-of date and that figures are end-of-day / quarterly.
- **Keep identity out.** Pass instruments and weights only — never client names or account numbers.

5. How it works & the refresh schedule

A single small server on an India-region VPS sits behind Cloudflare and serves every desk from a **shared daily disk cache** — so ~99% of requests never touch the upstream exchanges.

- **Fetch once, serve everyone.** Each upstream is fetched once per day and written to disk; every advisor is served from that file.
- **Scheduled refreshes** at **21:00 & 03:00 IST** — an evening grab after NSE publishes end-of-day data (~6–7 pm), plus an overnight full refresh — so the data is hot before market hours.
- **Lazy fallback.** Anything not yet cached is fetched once on demand and then cached; the cache also warms a few seconds after any restart.
- **Light by design.** A single async worker, per-caller rate limiting, and a tiny memory footprint — it runs comfortably on a 1 GB box.

> ✓ Because everything is end-of-day, once-a-day refresh is the right cadence — NSE and AMFI publish after the close, so polling more often would not yield fresher numbers. The cache also shields the free public sources from being rate-limited.

6. Design choices, limits & compliance

- **End-of-day, not live.** Built for a *morning* briefing — how things closed and trended — not intraday ticks. No real-time data is redistributed.
- **Public data only, attributed.** NSE end-of-day bhavcopy & indices, AMFI NAVs (via MFAPI), and public Screener-derived fundamentals. Sources are named in every response.
- **Financials are a static quarterly file** the operator maintains — auditable, and not scraped live.
- **No client / personal data.** The briefing takes only instrument IDs + weights — never names or account numbers. The client's real portfolio lives in the firm's own systems, not here.
- **News is intentionally not a tool** — "why did pharma move?" is answered by Claude's own web access.
- **Hosting & residency.** Hosted in India (Mumbai). Before a firm relies on it: confirm data-source terms, host in India (DPDP / RBI), keep it read-only, and obtain IT / InfoSec sign-off.

> ⚠ This is advisor tooling, not a system of record, and not investment advice. Figures are end-of-day / quarterly and provided as-is; verify against official sources before advising.

7. Sources & data freshness

DATA	FREE PUBLIC SOURCE	FRESHNESS
Stock OHLCV history	NSE Bhavcopy	End-of-day
Index levels & India VIX	NSE index close / allIndices	End-of-day
FII / DII flows	NSE FII/DII activity	End-of-day
Market breadth	Computed from NSE bhavcopy	End-of-day
Corporate actions · results	NSE corporate actions / event calendar	End-of-day
Bulk & block deals	NSE bulk/block deals	End-of-day
52-week highs / lows	NSE 52-week file	End-of-day

DATA	FREE PUBLIC SOURCE	FRESHNESS
Mutual fund NAVs	MFAPI.in (AMFI data)	End-of-day NAV
Company fundamentals	Quarterly public-Screener sweep (static file)	Quarterly

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