

Centricity

AN INTRODUCTION

INTRODUCTION



Established in 2022, Centricity offers a simple, cost effective and transparent technology enabled platform that helps investment professionals to manage their client portfolios better. As private Wealth Management professionals with decades of experience behind us, we have deep insights into the challenges faced by wealth managers, their clients and Asset managers. It is our endeavor to empower these three stakeholders using technology in order for them to achieve better outcomes.

Vision

To be a technology and product partner of choice for all Independent financial advisors and distributors.

Mission

We believe that there is a fundamental need to empower IFAs/MFDs in India so that investors achieve better outcome. Centricity handholds financial services professionals to engage their clients efficiently.

KEY SEED-INVESTORS

Lightspeed Venture Partners

*Leading Global
Venture Capital Firm*

Paramark Ventures

*Leading Korean
Venture Capital Firm*

MS Dhoni Family Office

*Family Office of
MS Dhoni*

NB Ventures Family Office

*Dubai-based
Venture Capital Firm*

Aakash Chaudhry

*Former CEO &
Founder of Aakash
Institute*

Ritesh Agarwal

*OYO Founder &
Group CEO*

Returning Investors

Burman Family

*Family Office of
Dabur Promoters*

Shantanu Agarwal

*Family Office of LNJ
Bhilwara Group*



\$20 Million At \$125 Million Valuation Funds Raised

FOUNDING LEADERSHIP – WITH 200+ YEARS OF COMBINED DOMAIN EXPERTISE

OUR FOUNDING TEAM INSTINCTIVELY UNDERSTANDS THE WEALTH MANAGEMENT ECOSYSTEM



**Manu
Awasthy**

CEO &
Founder

**23 years of combined
experience** in private
wealth management

wealth
360
ONE

citi

standard
chartered



**Gaurav
Tiwari**

Co-founder
Investment product

**19 Years of
experience** in private
wealth management

wealth
360
ONE

kotak
Kotak Mahindra Bank



**Aditya
Shankar**

Co-founder
Marketing & Communications

**20 years of
experience** in private
wealth management

wealth
360
ONE

citi

standard
chartered



**Manish
Sharma**

Co-founder
Finance & Operation

23 years of experience
in financial product
distribution

HDFC BANK

Deutsche Bank

AXIS BANK



**Pushpendra
Singh**

Co-founder
Technology product

**13+ years of
experience** in asset &
wealth management

wealth
360
ONE

ADITYA BIRLA
CAPITAL
Mutual Funds

A STELLAR FOUNDING TEAM

BACKED BY DEEP INDUSTRY EXPERIENCE AND EXECUTION STRENGTH



**Sachin
Jasuja**

Investment product
founding partner

18+ years of experience



**Ishkaran
Chhabra**

Chief investment counsellor
& founding partner

15+ years of experience



**Vinayak
Magotra**

Investment product
founding team

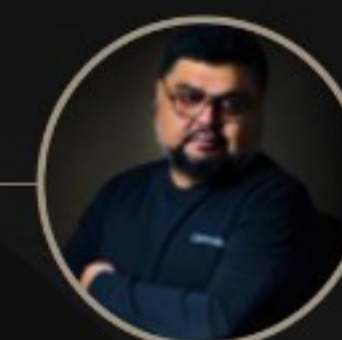
15+ years of experience



**Arpita
Hegde**

Business head-RIA
& founding team

22+ years of experience



**Faraz
Mahmood**

Founding team &
business head

22+ years of experience



**Anirudh
Mahanot**

Founding team &
business head

21+ years of experience



**Nirmal
Rewaria**

Chief strategy &
execution officer

30+ years of experience



**Shvetank
Mishra**

Founding team
- Invictus

25+ years of experience



**Tariq
Aftab**

Founding team -
OneSure

23+ years of experience

THE FINEST TECHNOLOGY TEAM DRIVING INNOVATION & PRECISION



**Kamal
Kishore**

Chief AI and
Technology Officer

**22+ years of global
experience,** Having built
and scaled platforms across
Fortune 100 Companies



**Peeyush
Srivastava**

Head of Engineering

14+ years of experience in
fintech engineering and
delivering cutting edge SaaS
solutions for wealth
management



**Sameer
Bordiya**

Head of Global Tech
Initiatives

16+ years of experience in
developing and scaling SaaS
products for fintech

THE FINEST TECHNOLOGY TEAM DRIVING INNOVATION & PRECISION



**Nikhil
Golatkar**

Technology product
founding partner

14+ years of experience building
software platforms for wealth
management



**Kunal
Shrivastav**

Technology product
founding partner

14+ years of experience in
designing & building scalable,
lean, robust software systems

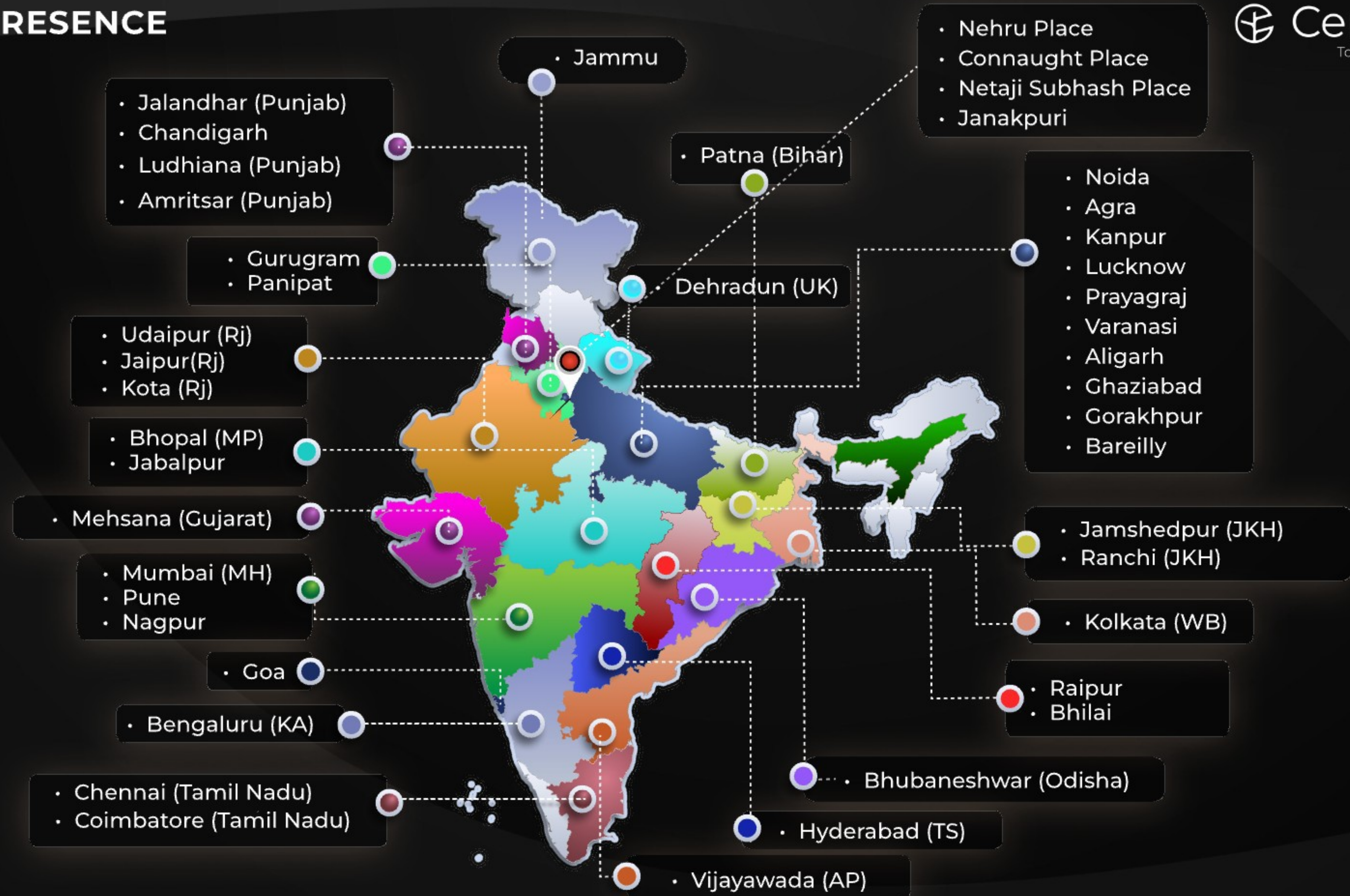


**Ameera
Dadarkar**

Technology product
founding team

**12+ years in technology, 5+
years in wealth
management**

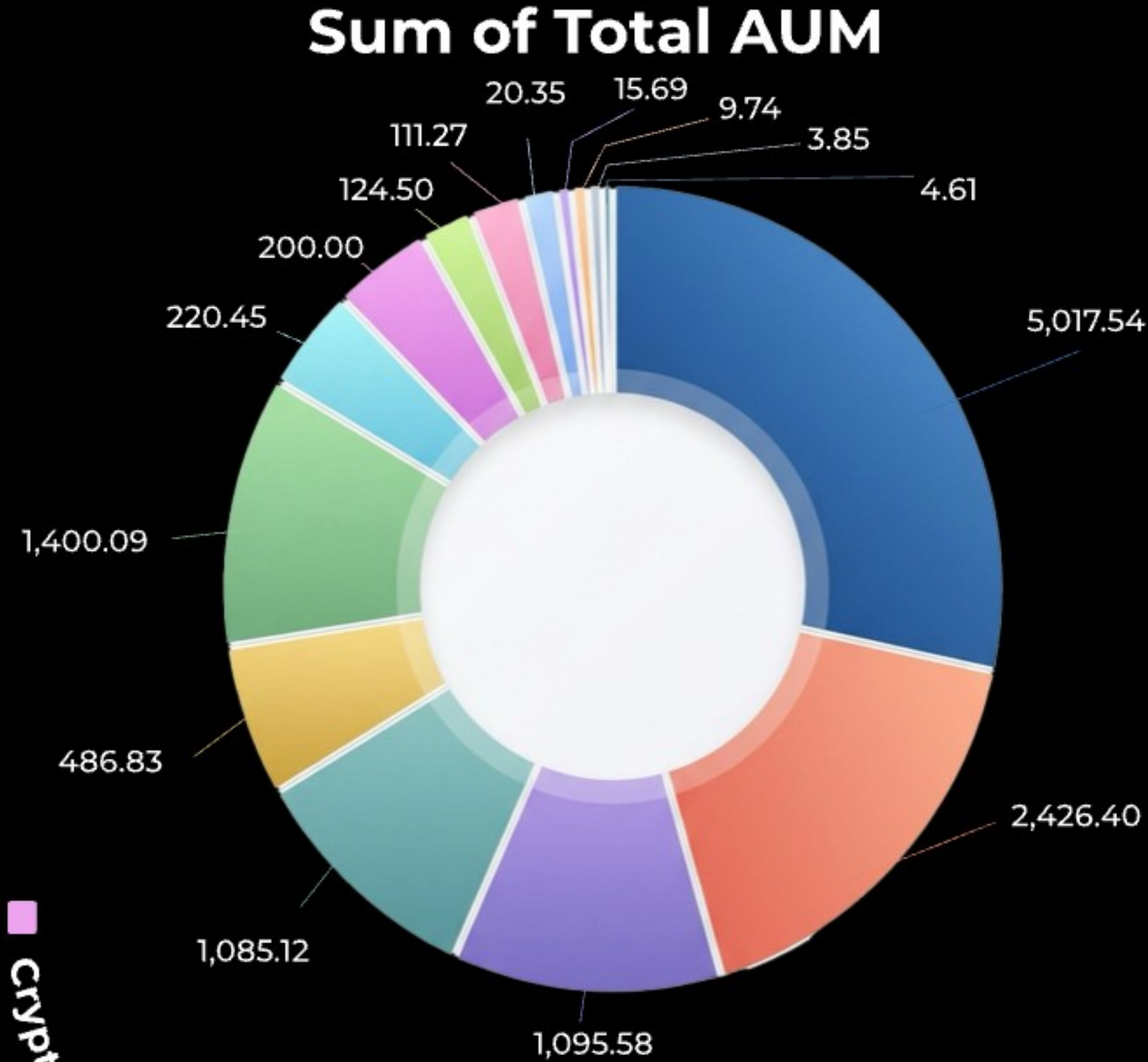
OUR PRESENCE



OUR AUM

Product	Sum of Total AUM
MF	5,017.54
UNLISTED	2,426.40
BONDS	1,095.58
PMS	1,085.12
AIF	1,400.09
Listed	486.83
FD	220.45
LRS	124.50
SIF	15.69
Gift City	9.74
P2P	3.85
LAS	20.35
REC54	111.27
LAMF	4.61
Crypto	200.00
Grand Total	12,222.02 Cr

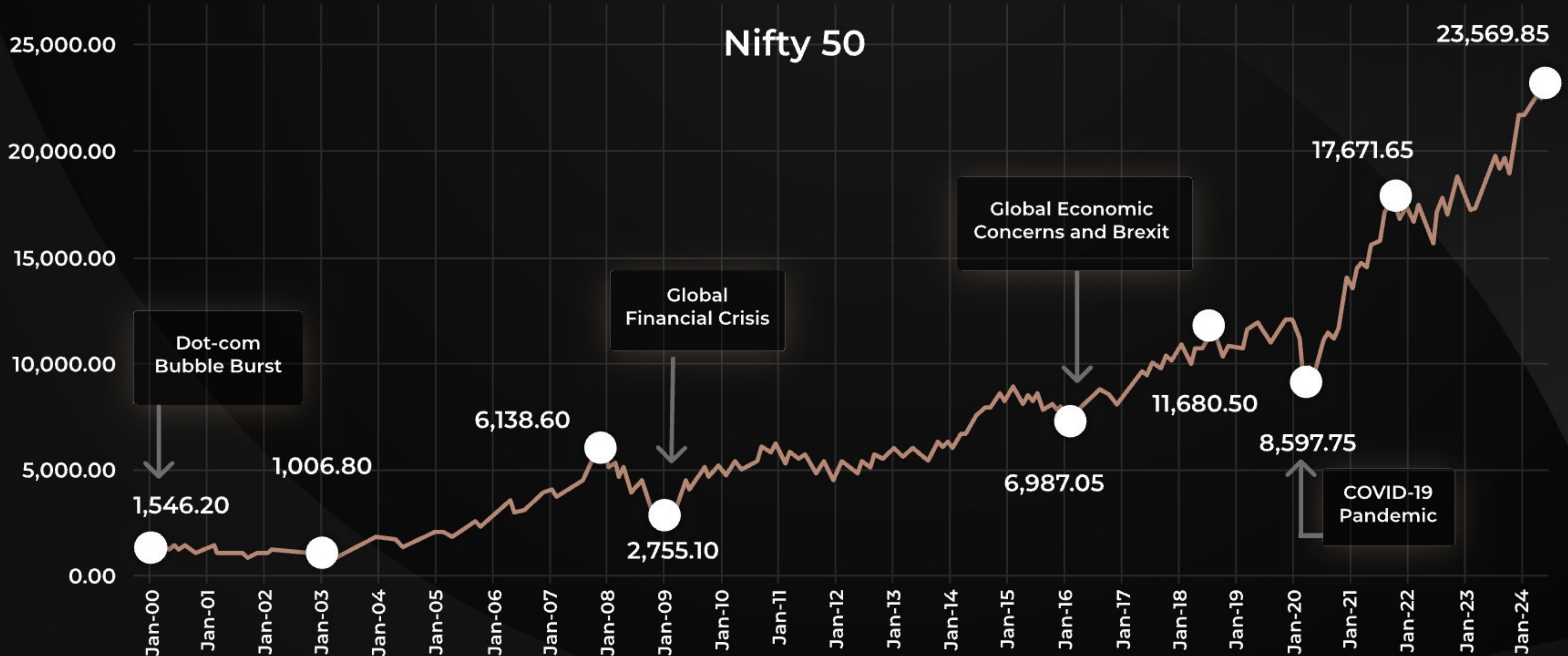
*As on 28th Feb 2026



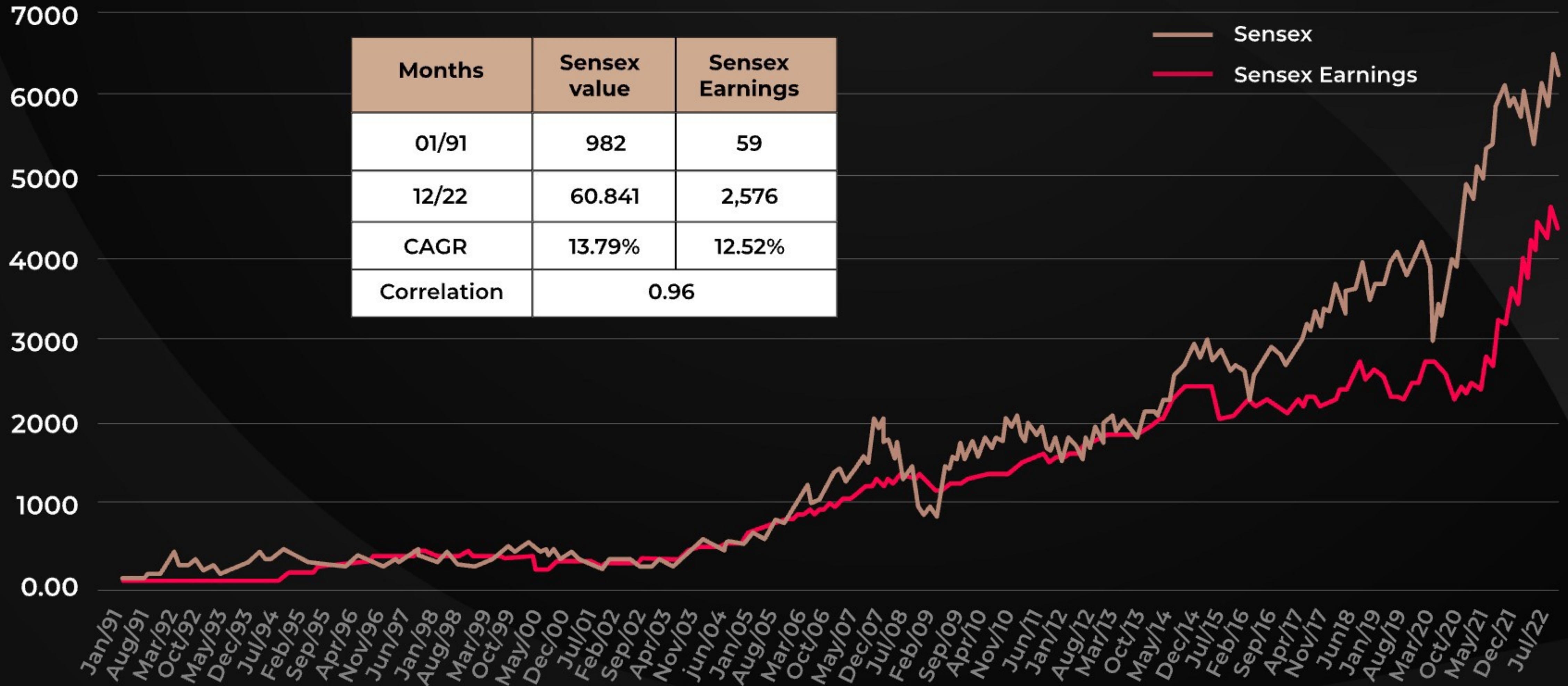
INDIA GROWTH STORY



NIFTY 50 GROWTH



EARNING IS THE KING!



SENSEX @ 80000 - JOURNEY FROM 70K TO 80K IS ONLY 6.5 MONTHS

8

Milestones*

1st 1000: Jul-1990
1st 10,000: 06-Feb-06
1st 20,000: 29-Oct-07
1st 30,000: 04-Mar-15
1st 40,000: 23-May-19
1st 50,000: 21-Jan-21
1st 60,000: 24-Sep-21
1st 70,000: 11-Dec-23
1st 80,000: 03-Jul-24
CAGR: 13.8%

EPS

2000: 196
2005: 507
2010: 869
2015: 1291
2020: 1410
July '25: 3493

BSE Market Cap

2000: 6.9 LK Crs
2005: 25.0 LK Crs
2010: 73.0 LK Crs
2015: 100.4 LK Crs
2020: 188.0 LK Crs
3-Jul-24: 445 LK Crs*

India's GDP (US \$)

1990: 327 Bi
2000: 477 Bi
2007: 1.24 Tri
2020: 2.71 Tri
2024: 3.91 Tri

Base Period: 1978-79 ; Base Value: 100 ; Inception: 2-Jan-1986 ; Index 549.4

549.4

1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 2025

How to Benefit from the market growth?

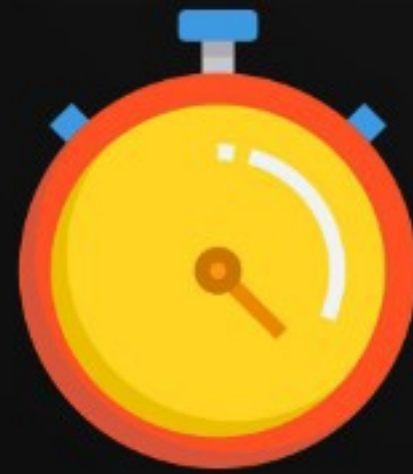


SIP: SYSTEMATIC INVESTMENT PLAN

SIP allows you to invest in mutual funds through small/periodic investments with a fixed amount, every month. It is a practical approach that helps investing in a disciplined manner to achieve your financial goals.



Rupee Cost
Averaging



Flexible: Can start or
stop anytime!



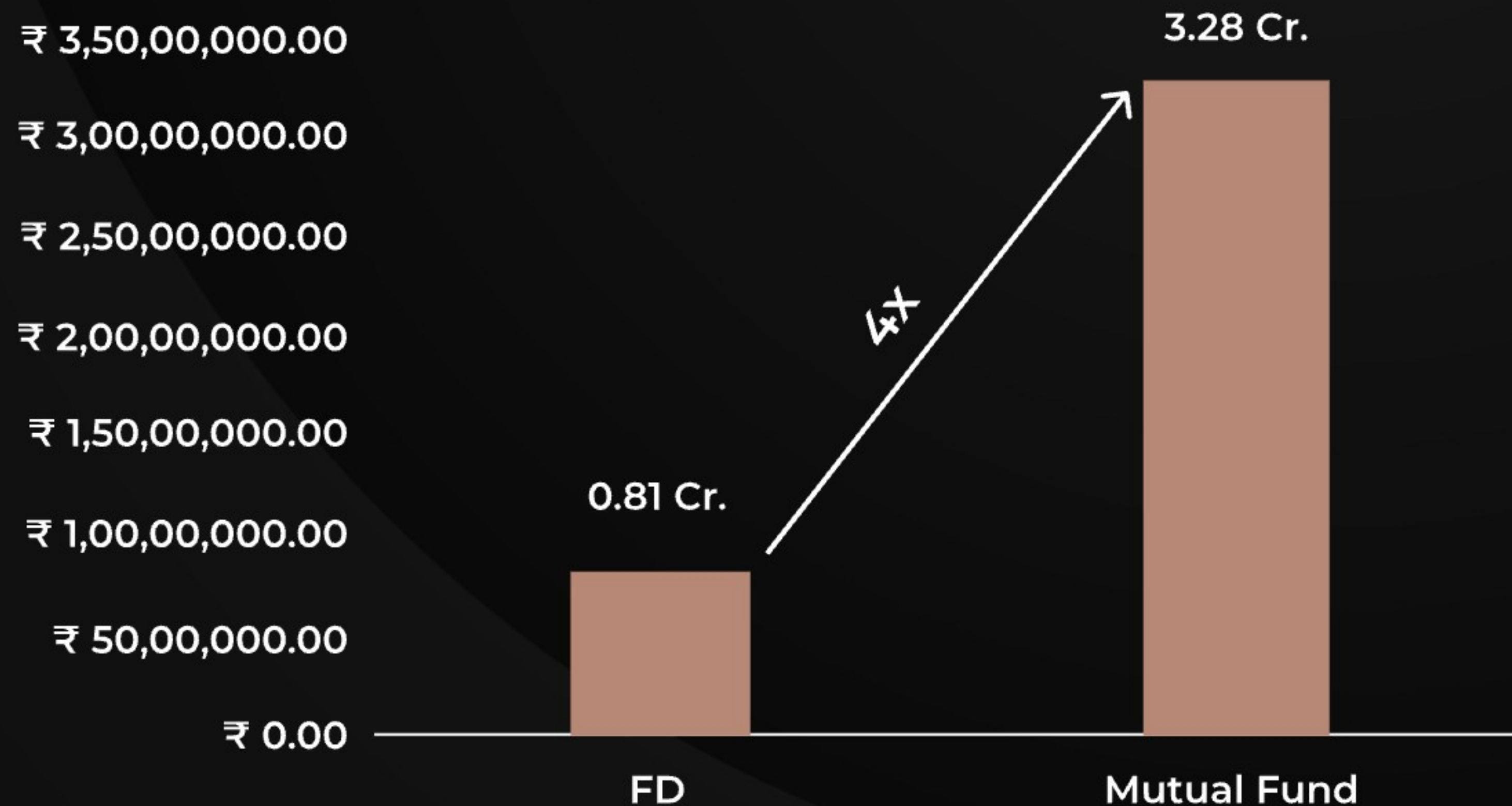
Benefit from Power of
compounding & build
wealth over years!



Inculcates discipline to
save & invest
regularly!

SIP – BEST FIRST STEP

Investment of Rs 10,000 per month for 25 Years



Standard rate of FD = 7% and Mutual Fund = 15%

BENEFITS OF INVESTING IN SIP

Inculcates Discipline to save and invest regularly.

Helps you benefits from power of compounding and create wealth over time.

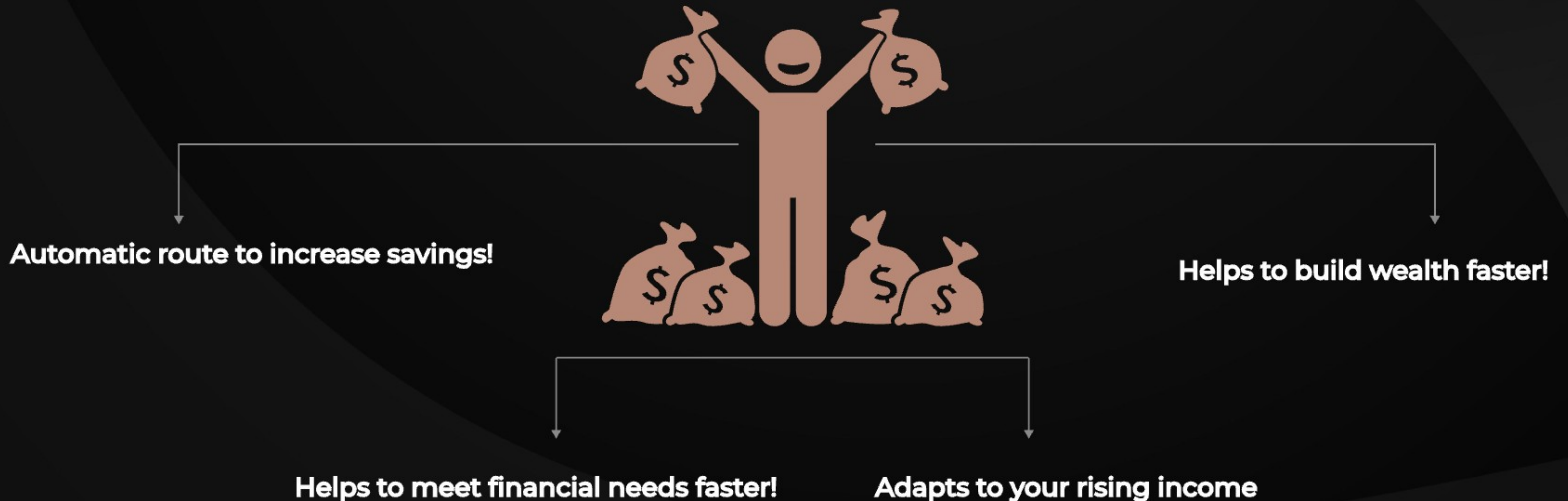
Rupee Cost averaging.

Convenience; Flexible; can start or stop anytime

TOP UP SIPs

A TOP-UP SIP is a SIP that grows automatically with time!

Make sure to increase your SIP savings automatically at fixed intervals. Even a small increase makes a substantial difference to the wealth created with the power of compounding.



FREEDOM SIP CONCEPT

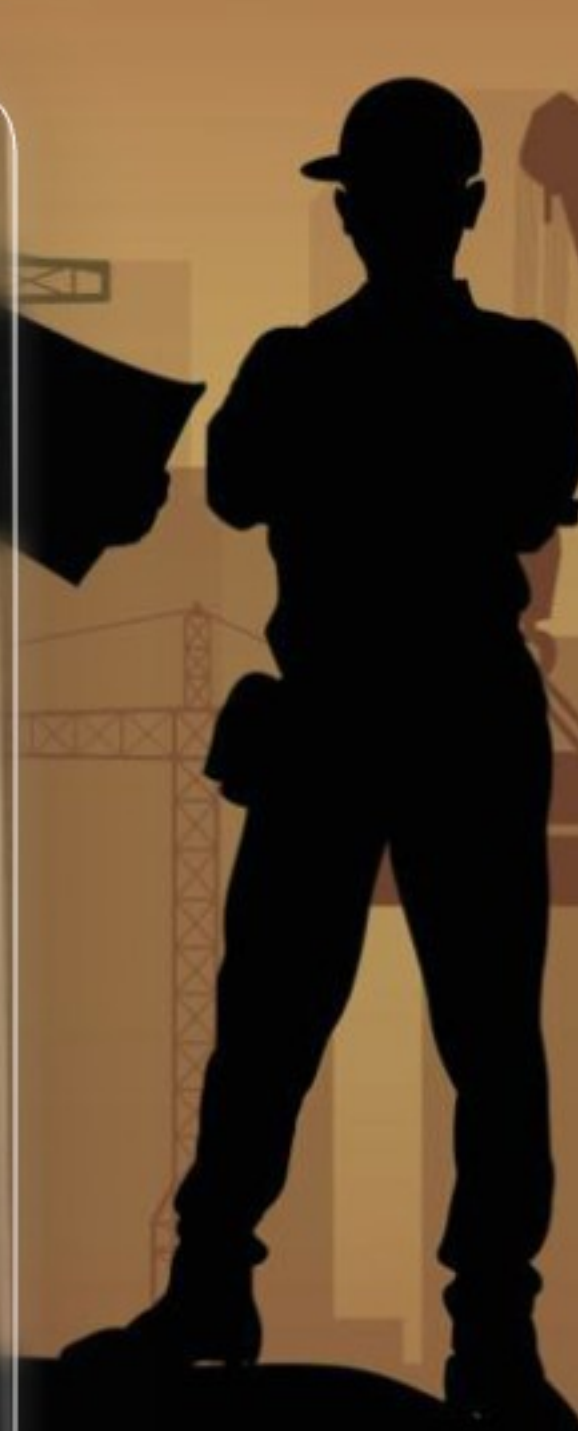
Freedom SIP is a feature that allows the investor to achieve their financial goals. This feature encourages the investor to invest regularly in a disciplined manner through Systematic Investment Plan (SIP) and enjoy the benefits of regular cash flows via Systematic Withdrawal Plan (SWP) post completion of SIP period

Freedom SIP comprises of three steps:

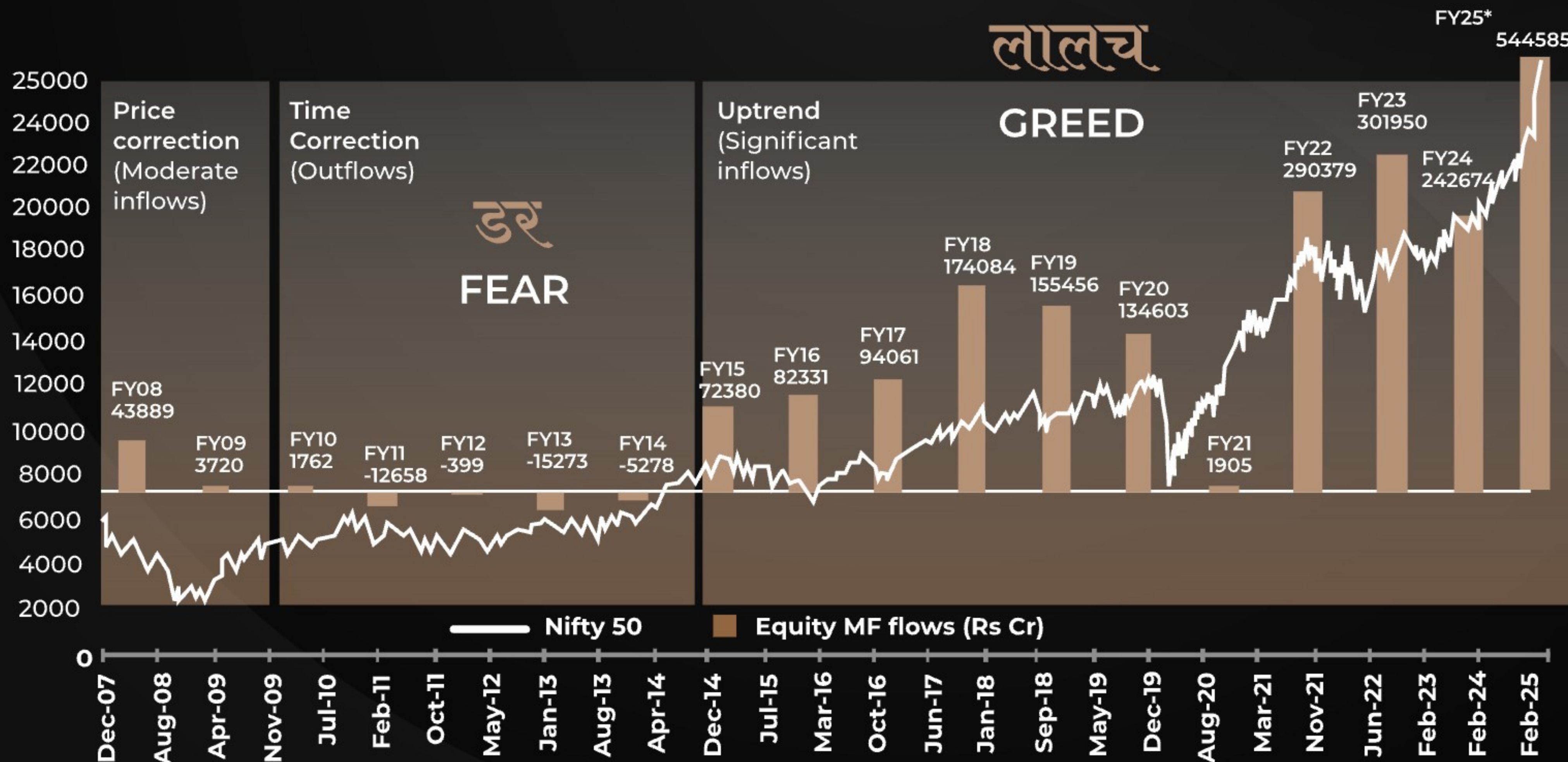
- 1** Grow your wealth through SIP in source scheme for Pre-defined period (T)
- 2** On completion of the chosen SIP period. Switch to target Scheme in T + 15 days
- 3** Get Monthly income through SWP in Target scheme starting from T + 1 months



How to Construct an Efficient Portfolio?



Investments Bring out our various emotions....

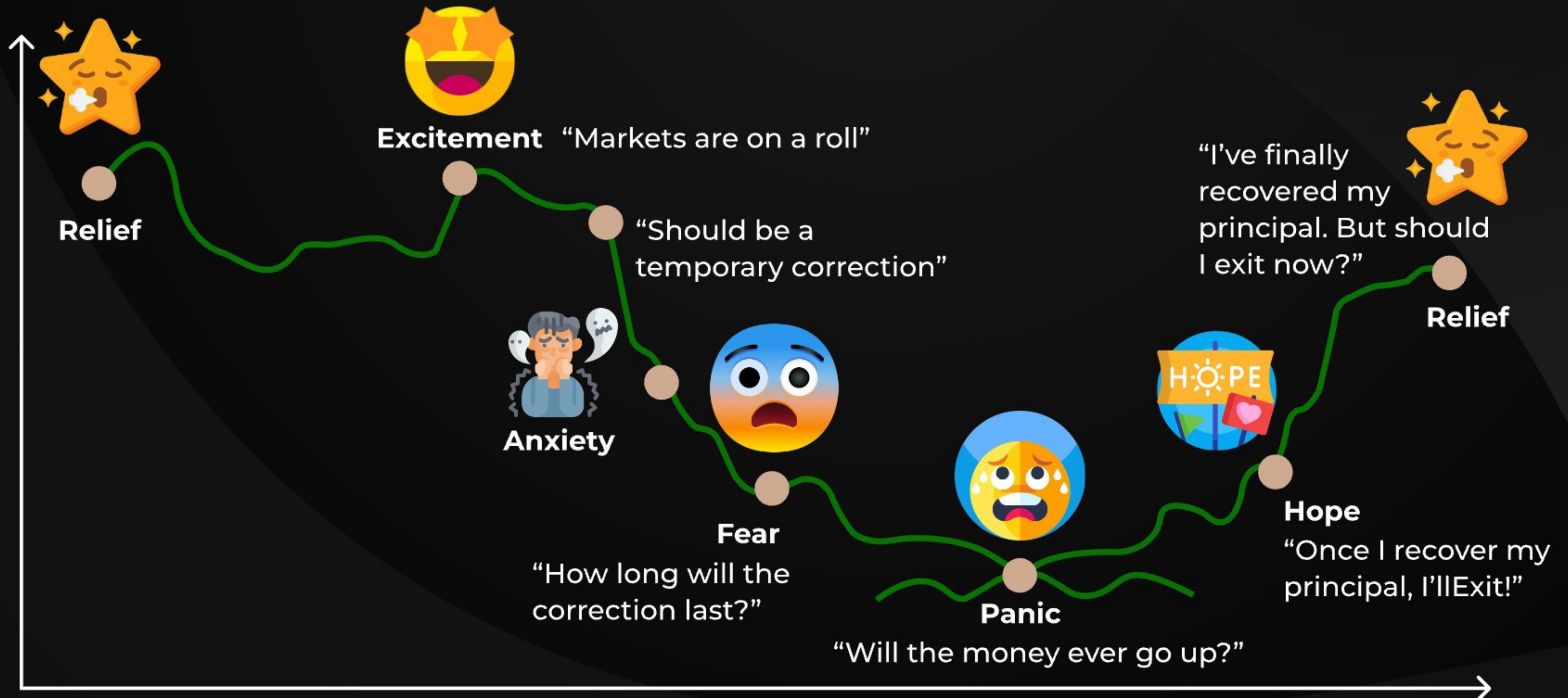


*Data till Mar 2025. Past Performance may or may not be sustained in future. Equity MF flows also Include other ETFs

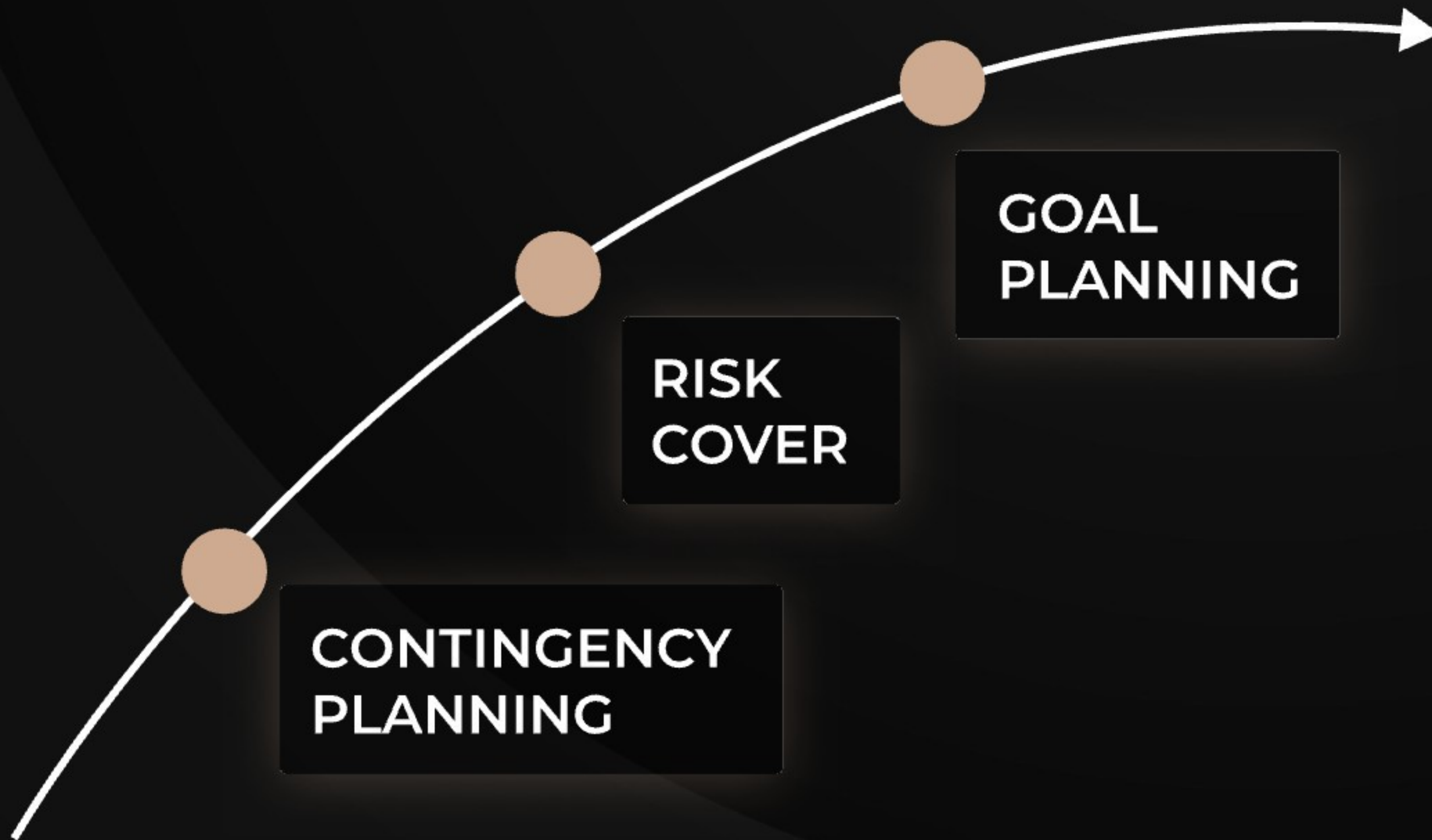
SIP will help to hedge the market volatility & will generate consistent returns over the market cycles!

AVOID THE EMOTIONAL CYCLE OF GREED & FEAR!

SIP provides disciplined approach to investing!



HOW TO BECOME AN INVESTMENT CHAMP!



BECOME A CHAMPION

WHY DO YOU NEED TO PLAN AND INVEST ?



CONTINGENCY

- JOB LOSS
- HEALTH ISSUES
- ACCIDENTS
- PERSONAL LOSS



MEDIUM TERM GOAL

- PAY OFF DEBT
- A NEW CAR
- BUILDING YOUR DREAM HOUSE
- VACATION



LONG TERM GOAL

- RETIREMENT PLANNING
- MARRIAGE OF CHILDREN
- CHILD EDUCATION

HOW TO CONSTRUCT PORTFOLIO: CORE & SATELLITE

CORE PORTFOLIO

- Foundation of portfolio.
- Fill it, Shut it, Forget it.
- Cover all caps
 - Large cap
 - Mid cap
 - Small cap
- Cover all Investment Styles.
 - Growth
 - Value
 - Momentum

SATELLITE PORTFOLIO

- Opportunistic calls.
 - Alpha generator.
 - Entry/Exit critical
 - Understanding risks/trends must.
- Example:
- Business cycle fund
 - Banking and financial fund
 - Infra & manufacturing fund

WHAT ARE THE KEY COMPONENTS OF ACHIEVING ALL OF THIS?



A Multi-product ,
multi asset
approach to wealth
management .



An asset allocation
based approach to
achieving your clients
financial goals.



Leveraging tech
tools

Access to all Mutual Fund AMCs

WHAT TO PICK ?

Strategy	PMS & AIF	MF
Nature of Returns	PMS/AIF though is expected to outperform its benchmark works on an alpha generating strategy.	Mutual funds generally work to create benchmark plus returns.
Portfolio Construction	Not necessary for PMS/AIF managers to create benchmark hugging portfolios thus the fund manager may shun sectors that are expected to underperform.	Mutual Funds generally run a benchmark hugging strategy without major deviations.
Diversification	PMS/AIF portfolios generally run a optimally diversified portfolio of 25-30 stocks thus, the impact of stock movement is higher.	Mutual funds which run a very over diversified portfolio especially in mid and small caps where liquidity die to size of investment becomes a problem.
Stock Universe	PMS/AIF may invest in early stock ideas.	Mutual Funds generally restricted to invest in top 500 stocks.

WHAT CENTRICITY BRINGS TO THE TABLE?



FIXED INCOME OFFERINGS

Category	Description	Holding Period	Credit Risk	Interest Risk	**Liquidity	*Indicative Returns
Liquid Funds	Invests in money market instruments, Low volatility, Offers high level of liquidity, Zero cost of exit after 7 days	0-3 Months	Low	Low	High	6-6.75%
Ultra Short Term Funds	Invests in instruments with maturities of around one year, High liquidity.	3-6 Months	Low	Low	High	6.50-7%
Arbitrage Funds	Captures spread between cash and futures, Low risk, Tax efficient option.	3-12 Months	NA	NA	High	6.50-7%
Commercial Paper	Money market instruments, Issued by corporates, Governed by RBI, Hold to Maturity instrument	3 -12 Months	Low	Low	Low	7-7.50%
Certificate of Deposits	Money market instruments, Issued by banks, Governed by RBI, Hold to maturity instrument	3 -12 Months	Low	Low	Low	7-7.50%
Corporate Deposits	Fixed Deposits offered by NBFC, higher coupon compared to Bank FDs, flexibility to choose regular coupons or cumulative returns, High liquidity.	>3 Months-10 Years	Low to Medium	Low	High	7.50-8.50%

*All the above-mentioned yields are indicative pre-tax yield (except for tax free bonds) and are subject to market interest rate risks.

**Because of lock in

FIXED INCOME OFFERINGS

Category	Description	Holding Period	Credit Risk	Interest Risk	**Liquidity	*Indicative Returns
Low Duration Funds	Invests in short-term debt securities, Low volatility, high level of liquidity	6-12 Months	NA	NA	High	7-7.50%
Corporate Bonds/ NCDs	Issued by large corporate houses, Attractive yield, Regular cash flows. Across the credit spectrum.	12-36 Months	Low to High	Low to High	Medium	7.50-15%
Tax Free Bonds	Issued by quasi government entities, Tax free coupon, Attractive annual cash flows, Possibility of capital gains, High credit quality	>36 Months	Low	High	High	5-5.25%
Credit PMS/ AIFs	Actively Managed customised investment solution, aims to generate optimal risk-adjusted returns by investing in debt instruments for those companies or purposes that do not have access to funds through the banking channel.	>36 Months	High	Low to Medium	Low	12-18%

*All the above-mentioned yields are indicative pre-tax yield (except for tax free bonds) and are subject to market interest rate risks.

**Because of lock in

EQUITY OFFERINGS

Category	Description	Holding Period	Riskometer	**Liquidity	*Indicative Returns
Mutual Fund					
Index Funds	'Passively managed funds and try to mimic the performance of the respective Indices like the NSE Nifty, BSE Sensex, subject to tracking errors.	> 36 Months	Very High	High	12-13%
Large Cap Funds	Invests predominantly in stocks of top 100 companies that have well-established businesses.	> 36 Months	Very High	High	12-13%
Diversified Funds	Diversified funds give investors' access to a wide range of industries and companies (Top 500) with different market sizes under one umbrella.	> 36 Months	Very High	High	14-16%

*Investments are subject to market risks.

**Because of lock in

EQUITY OFFERINGS

Category	Description	Holding Period	Riskometer	**Liquidity	*Indicative Returns
Mutual Fund					
Mid Cap Funds	Invest in mid-cap companies (101-150) that have the potential to become industry leaders in the future.	> 36 Months	Very High	High	15-16%
Small Cap Funds	Invest in relatively smaller in size companies (250+) that have a significant growth potential and are ideal for aggressive investors with a long-term investment horizon.	> 36 Months	Very High	High	16-18%
Sectoral Funds & Thematic Funds	Funds that invest in a certain market segment or sector/theme such as infrastructure, digital, healthcare etc or any particular theme. Sectoral/ Thematic funds are extremely risky in nature.	> 36 Months	Very High	High	15-18%
ELSS	ELSS Funds are tax-saving mutual funds in India which comes with a lockin period of 3 years. You can save tax under Section 80C on investments up to Rs. 1.5 lakh every year.	> 36 Months	Very High	Low	14-15%

*Investments are subject to market risks.

**Because of lock in

EQUITY OFFERINGS

Category	Description	Holding Period	Riskometer	**Liquidity	*Indicative Returns
PMS					
Equity PMS	PMS is a unique and customised fund management service provided normally to HNW and UHNW investors. It comes with higher degree of customization. While PMS involves higher costs, it also offers potentially higher returns.	> 36 Months	Very High	Medium	14-18%
AIF					
Equity AIF	Funds that invest in specifically designed public equities portfolios including listed and unlisted stocks and derivatives. These can be both open-ended and close-ended.	> 60 Months	Very High	Medium	16-20%
Private Equity Funds	Private Equity (PE) funds invest in unlisted companies with high growth potential, typically through buyouts or significant equity stakes. These are long-term investments aimed at value creation through active management, operational improvements, and strategic guidance. Suitable for patient capital seeking substantial capital appreciation. These are close ended funds.	>60 months	Very High	Low	20-22%

*Investments are subject to market risks.

**Because of lock in

EQUITY OFFERINGS

Category	Description	Holding Period	Riskometer	**Liquidity	*Indicative Returns
Stocks					
Direct Equity	A direct equity investment is about independently and directly investing in publicly listed companies traded over stock exchanges.	> 36 Months	Very High	High	12-15%
Unlisted - Direct Equity	Shares are not available for public trading and are generally held by a limited number of individuals or entities, such as promoters, founders, venture capitalists, or strategic investors. Unlisted shares may offer higher growth potential and typically have lower liquidity.	> 60 Months	Very High	Low	18-20%

*Investments are subject to market risks.

**Because of lock in

HYBRID OFFERINGS

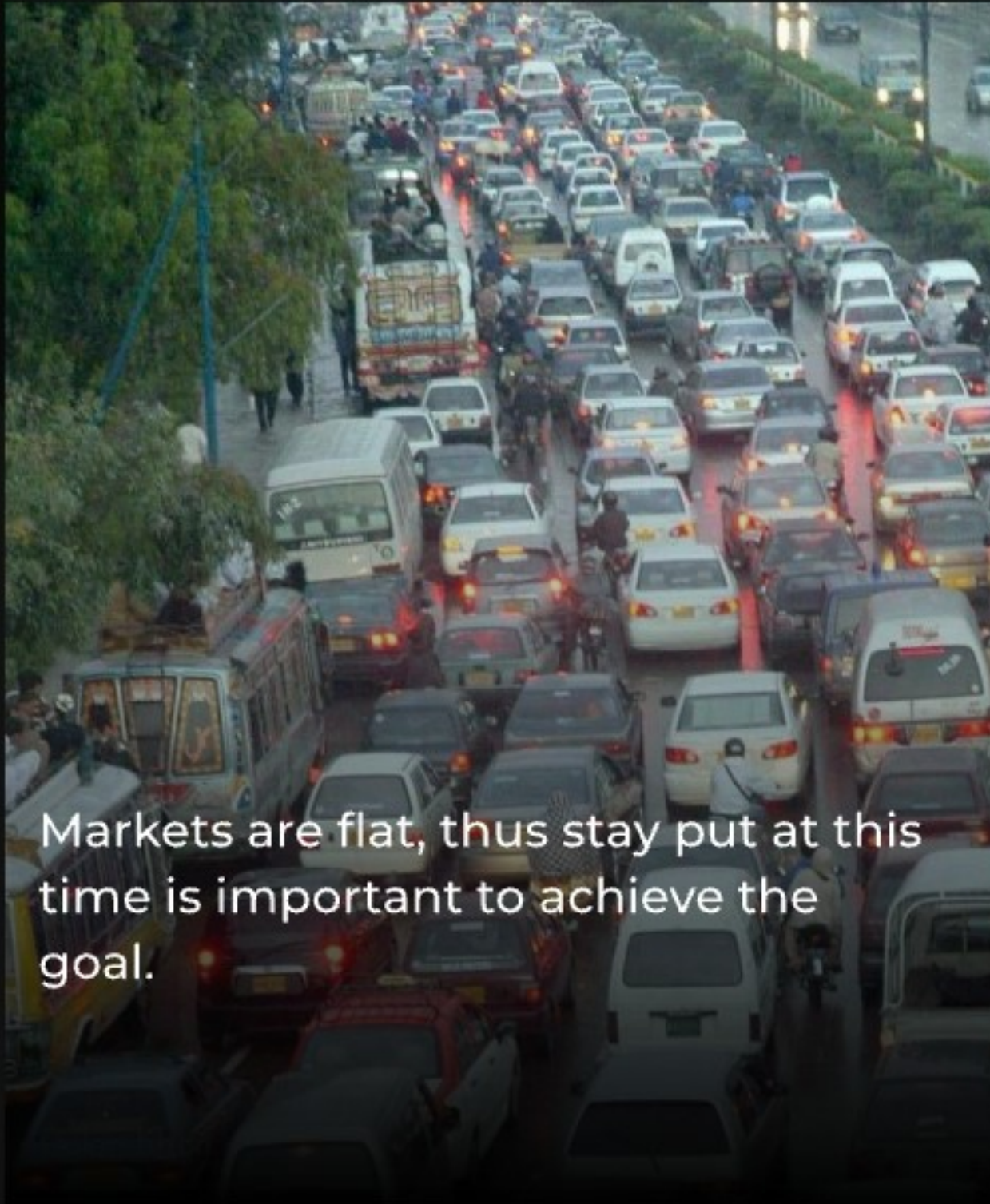
Category	Description	Holding Period	Riskometer	**Liquidity	*Indicative Returns
Hybrid Mutual Funds					
Hybrid Mutual Funds	Invest in both equity and debt instruments. The equity portion helps them generate inflation-beating returns while the debt investments help them earn stable returns.	>36 Months	Very High	High	9-12%
Solution Oriented Funds	Helping investors achieve specific goals like child education, retirement planning etc. and usually comes with a lockin period of 5 years.	>36 Months	Very High	Low	10-12%
Conservative Hybrids	Funds can invest 75% to 90% of its portfolio in debt securities and the rest in equity securities. Ideal for risk-averse investors with at least 2-3 year investment horizon.	>36 Months	Very High	High	8-9%
Equity Savings Funds	Equity Savings Funds essentially generate returns by investing in equity, debt, and arbitrage opportunities. Generate potentially higher returns compared to Bank FDs with greater tax advantage.	>36 Months	Moderately High	High	8-10%

*Investments are subject to market risks.

**Because of lock in

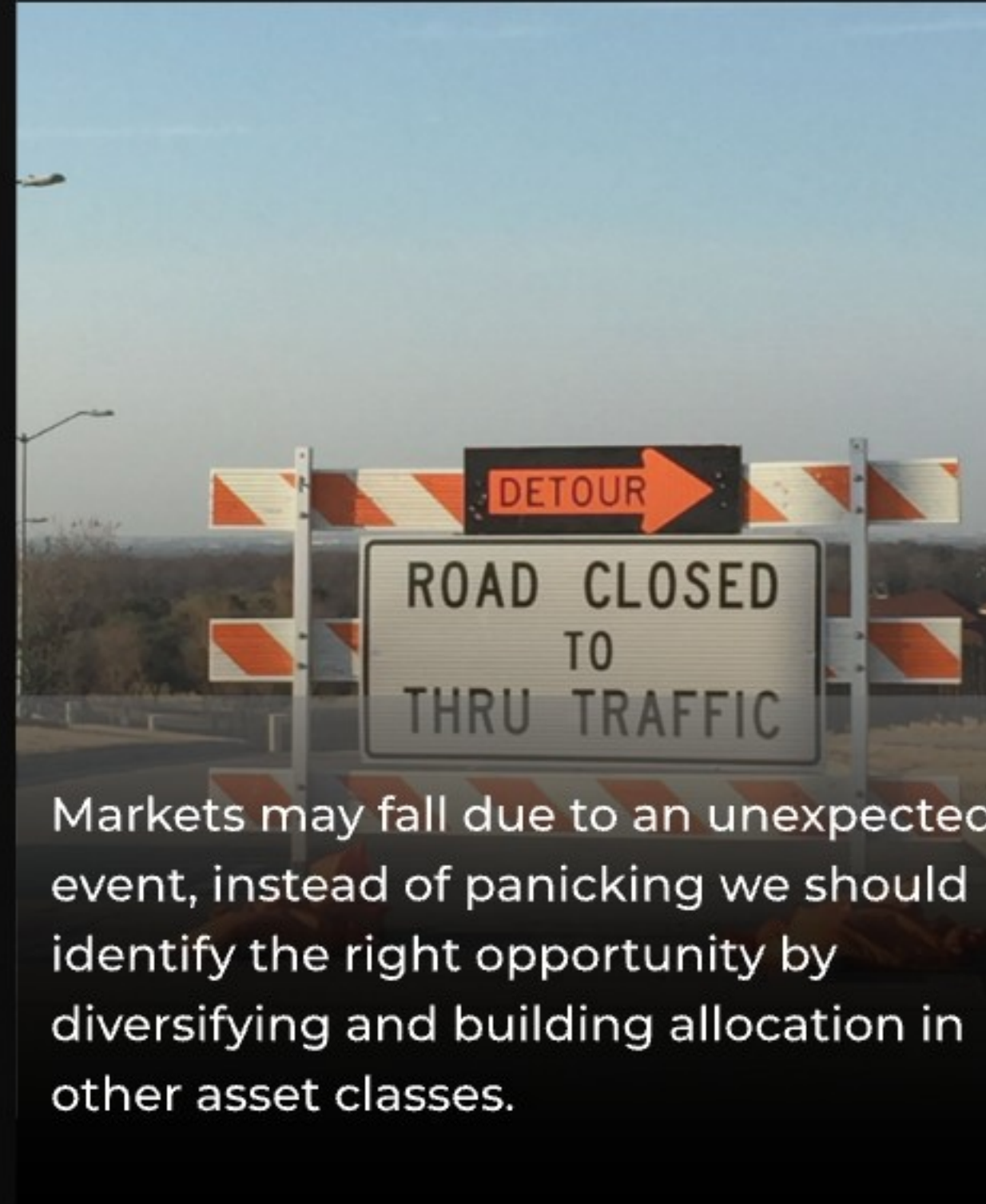
THE JOURNEY IN A CAR – FROM START TO DESTINATION

Car in Traffic, must stay put



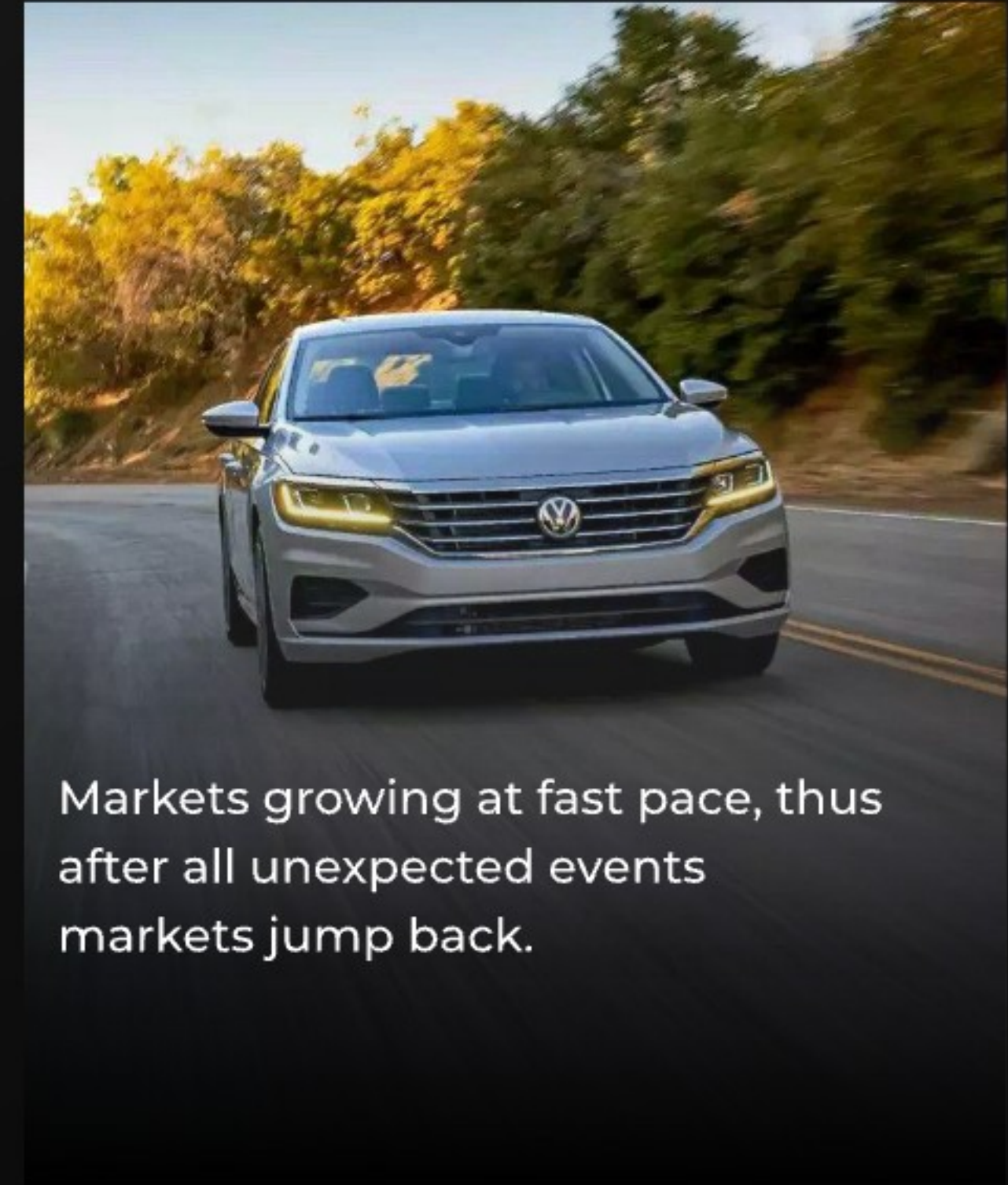
Markets are flat, thus stay put at this time is important to achieve the goal.

Road Blocked, need to find another way



Markets may fall due to an unexpected event, instead of panicking we should identify the right opportunity by diversifying and building allocation in other asset classes.

Car on Highway [Clear Way]



Markets growing at fast pace, thus after all unexpected events markets jump back.

Work of an Investment Advisor to Rudder People in Cycles of Greed and Fear. In Long Term Earnings is The key Earnings Growth vs Market Movements

CLIENT WITHOUT WEALTH MANAGER

Market Crash of 4th June Explained



Hii friend!
The market crashed
all my gains made in
last 1 year have wiped
out. I think I should
redeem

Yes, I think you should.



Conversation on June 4th



I booked my funds, but
the markets are back to
normal instead in bull
run. I made such a bad
decision of redeeming
my investments

Oh no !



Conversation on June 7th

Market Crash of 4th June Explained



Hi sir, the market has crashed all my gains made in last 1 year have wiped out. I think I should redeem

No, sir this is a temporary correction. Instead, you should buy on this amazing dip.



Conversation on June 4th



The markets revived and made a huge gain on my new investments. Thankyou so much.

Welcome Sir!
MY JOB.



Conversation on June 7th

DATA PROTECTION



Fronted and Backend level data encryption (TLS) so that data breach is never a possibility. This is a default feature.



Cloud access security broker. (CASB)



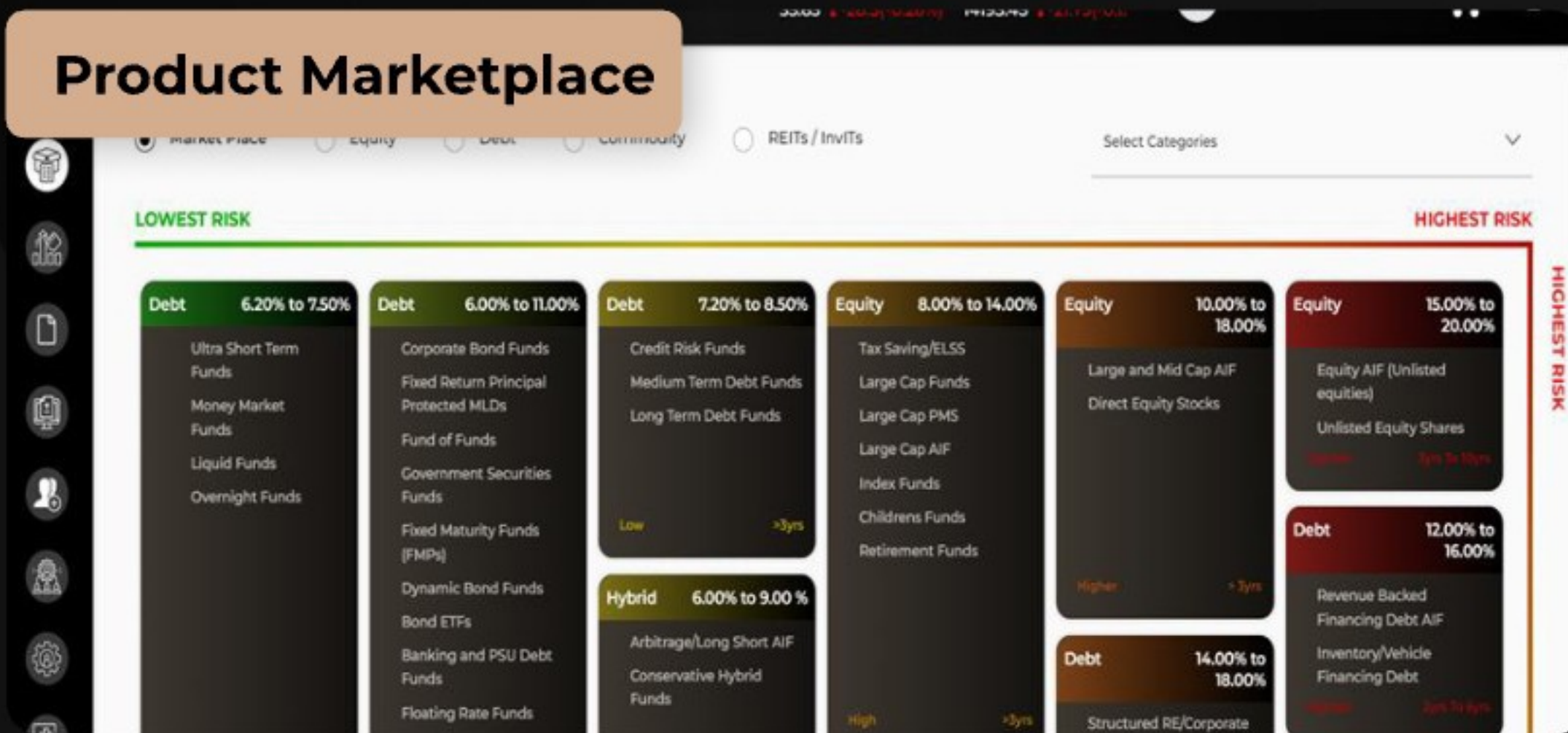
Jump servers and network access control lists. (NACL)



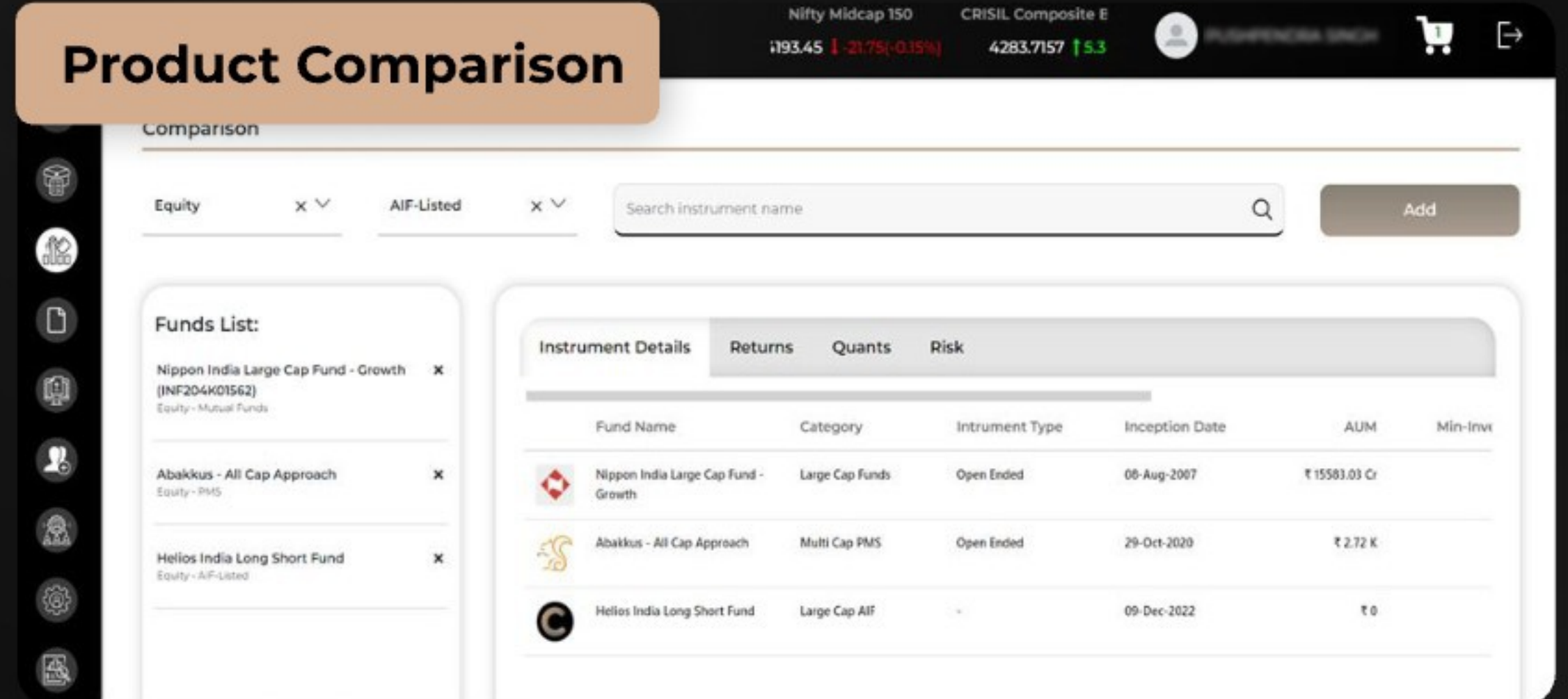
Access management system.

TECH PROFICIENCY 1/2

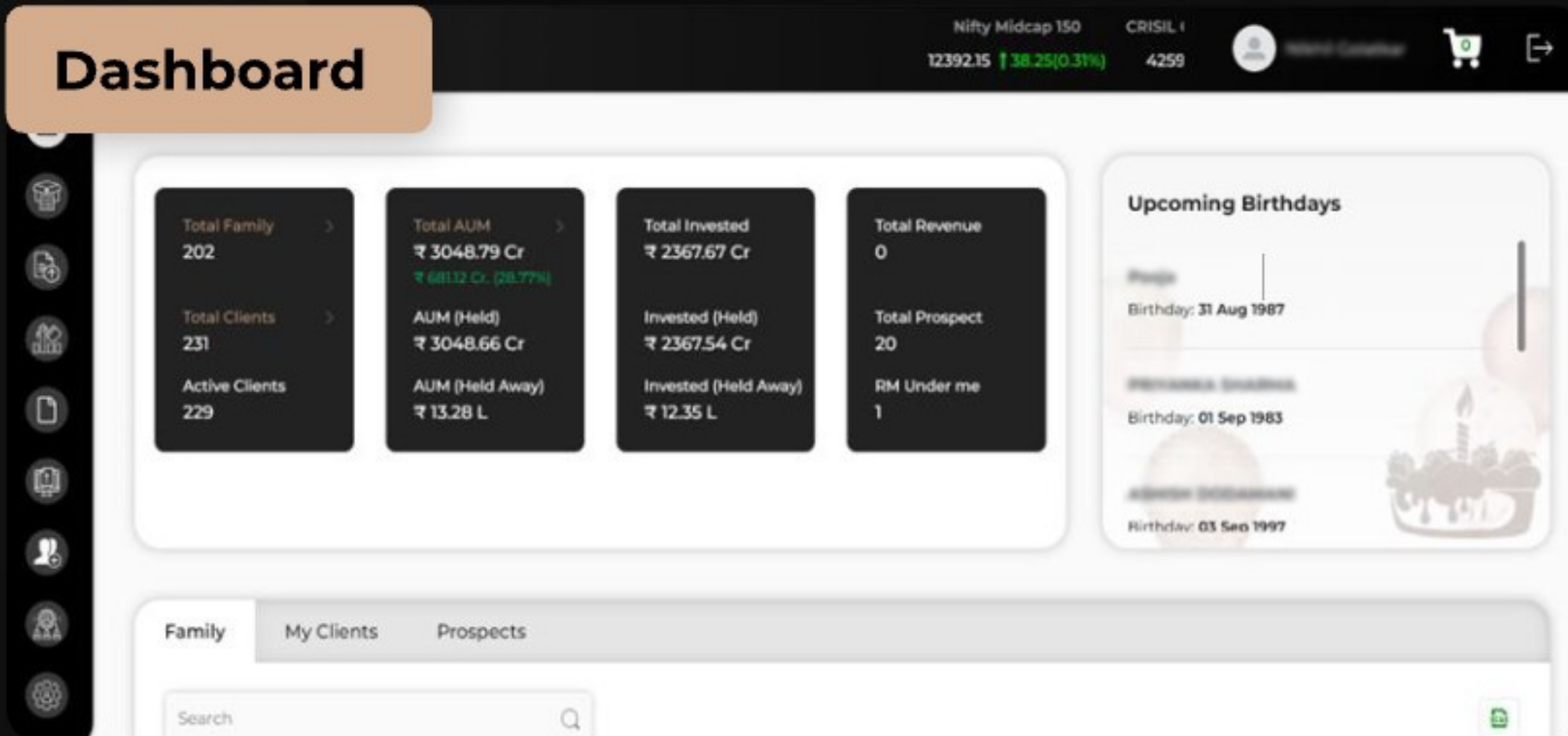
Product Marketplace



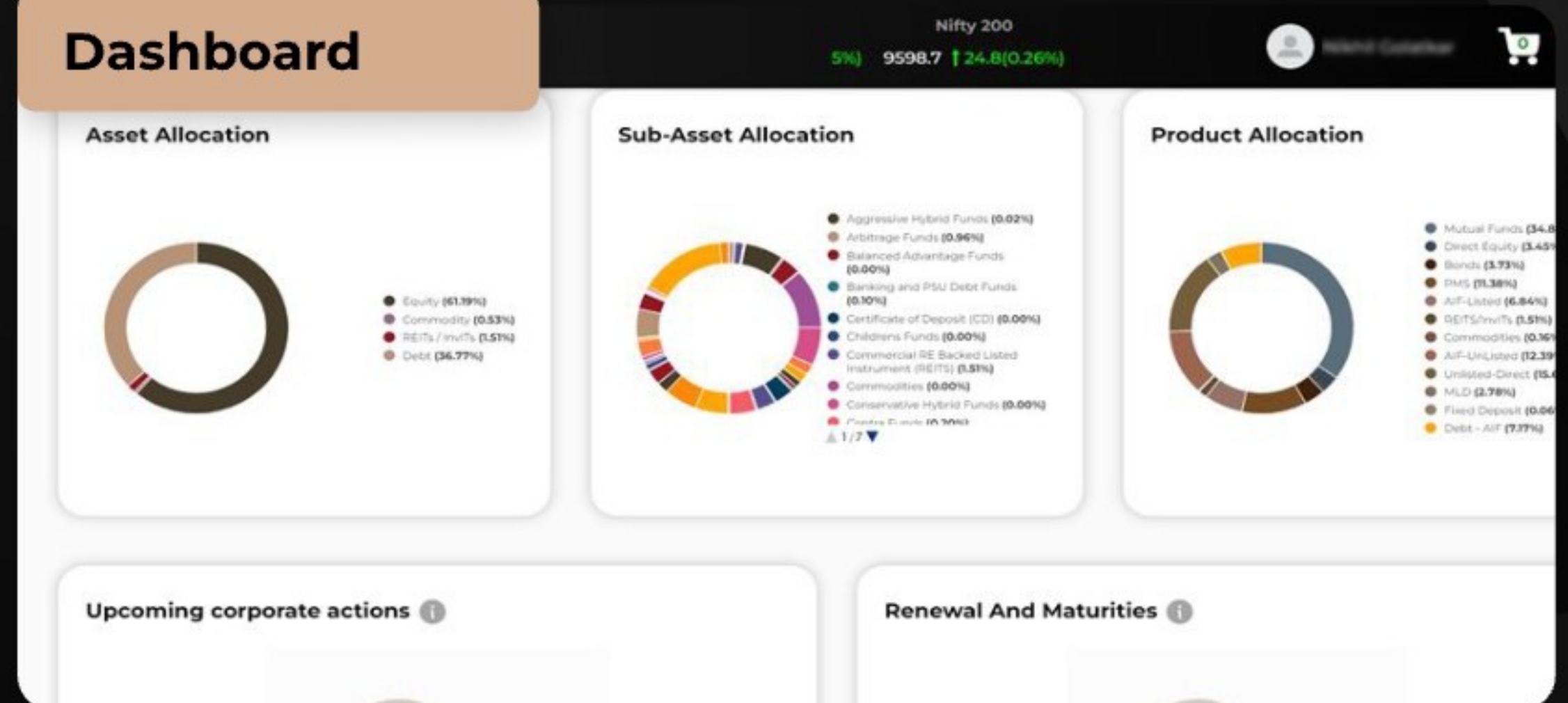
Product Comparison



Dashboard



Dashboard



TECH PROFICIENCY 2/2

Product Marketplace

Market Place

LOWEST RISK

Debt 6.20% to 12.00%

Ultra Short Term Funds

Money Market Funds

Liquid Funds

Overnight Funds

HIGHEST RISK

Equity 15.00% to 20.00%

Equity AIF (Unlisted equities)

Unlisted Equity Shares

Debt 12.00% to 16.00%

Revenue Backed Financing Debt AIF

Inventory/Vehicle Financing Debt

Large Cap PMS (Equity) High (~12.00%-13.00% IRR)

Asset class: Equity Instrument category: PMS

Category Definition

PMS or portfolio management services is a professional service provided by qualified and experienced portfolio managers supported by research teams who manage stock portfolios on behalf of investors. These are usually discretionary in nature i.e. the decision making on portfolio construction and operation is taken by the fund manager for a certain fees. They can follow different themes, styles and strategies and overall operate focused/concentrated portfolios as

Category suitability/ Applicability

Suitable for investors with high risk appetite looking for significant outperformance and flexibility as compared to mutual funds.

Taxation

Equity taxation applies on transaction of individual stocks held in the portfolio i.e. LTCG @10% and STCG @15%

Systematic Report

Systematic Report

Running Currently Forthcoming Summary Ceased Summary

Period

Start Date: 05/08/2021 End Date: 28/08/2023

All SIP STP SWP Process

Grand Total : ₹2,78,19,000 Count : 1309

Client	Instrument From	Instrument To	Folio No.	Start Date	End Date	Amount	Frequency	ARN No
...	UTI Nifty 50 Index Fund Regular Plan Growth		577356823731	25-Jul-2023	31-Dec-2099	10000	Monthly	ARN-189274
...	ICICI Prudential India Opportunities Fund Regular Growth		26883048/51	22-Jun-2023	24-Dec-2099	5000	Monthly	ARN-189274

Add Transaction

Steps

- Client Details
- Transaction Type
- Scheme Selection
- Scheme Details
- Payment Details

Add Transaction

Step - Client Details

CLIENT * BROKER CODE * SUB-BROKER CODE *

CLIENT * ARN-189274 189274

EUIN NUMBER * E897123

SELECT PRODUCT *

FD/RD Insurance Loan P2P Lending

ProductListing

Market Place Equity Debt Commodity REITs / InvITs

Mutual Funds x Liquid Funds x Select AMC Select Instrument Type

List View Reset Sort B

ICICI Prudential Liquid Fund Growth
Liquid Funds
INF109K01VQ1

Open / Close Ended: Open Ended

Expense ratio: 0.29%

AMC: ICICI Prudential Asset Management Company Limited

Fund Manager: -

AUM: ₹ 43976.45 Cr

NAV: ₹ 339.39

HDFC Liquid Fund Growth
Liquid Funds
INF79KB3HK0

Open / Close Ended: Open Ended

Expense ratio: 0.30%

AMC: HDFC Asset Management Company Limited

Fund Manager: -

AUM: ₹ 61368.47 Cr

NAV: ₹ 4.50 K

Axis Liquid Fund Growth
Liquid Funds
INF846K01412

Open / Close Ended: Open Ended

Expense ratio: 0.24%

AMC: Axis Asset Management Company Limited

Fund Manager: -

AUM: ₹ 27001.80 Cr

NAV: ₹ 2.55 K

Nippon India Liquid Fund Growth
Liquid Funds
INF204K01UN9

Open / Close Ended: Open Ended

Expense ratio: 0.34%

AMC: Nippon Life India Asset Management Ltd

Fund Manager: -

AUM: ₹ 32767.86 Cr

NAV: ₹ 5.60 K

SUPPORTING TOOLS

Quick Invest

+ Add Instrument

Total Investment Amount: ₹ 30.00 L Total Amount Entered: 0 Adjustment Amount: 30,00,000

Search

Instrument Name	Asset Name	Deployment Strategy	Liquidity/Maturity	Taxation	Expected Pre-Tax ROI	Amount
* Mutual Funds						
☐ Mirae Asset Large Cap Fund Regular Growth	Equity	Staggered	T+2	LTCG Post 12 Months	12.00%	
☐ HDFC Nifty 50 ETF	Equity	Staggered	T+1	LTCG Post 12 Months	12.00%	
☐ SBI Nifty Index Fund Regular Growth	Equity	Staggered	T+2	LTCG Post 12 Months	12.00%	

Preview & Download

Compare Tool

Category: Large Cap Funds

Compare Details

Funds

	Instrument Details	Returns	Quants	Risk
☒ Aditya Birla Sun Life Frontline Equity Fund Growth (INF209K01BR9)	AMC NAME: Aditya Birla Sun Life AMC Ltd CATEGORY: Large Cap Funds	ASSET-PRODUCT: Equity-Mutual Funds	INSTRUMENT TYPE: Open Ended	INCEPTION DATE: 30-Aug-2002 AUM: ₹ 26046.41 Cr
☒ Nippon India Large Cap Fund - Growth (INF204K01562)	AMC NAME: Nippon Life India Asset Manag... CATEGORY: Large Cap Funds	ASSET-PRODUCT: Equity-Mutual Funds	INSTRUMENT TYPE: Open Ended	INCEPTION DATE: 08-Aug-2007 AUM: ₹ 21453.98 Cr
☒ Mirae Asset Large Cap Fund Regular Growth (INF169K01010)	AMC NAME: Mirae Asset Investment Mana... CATEGORY: Large Cap Funds	ASSET-PRODUCT: Equity-Mutual Funds	INSTRUMENT TYPE: Open Ended	INCEPTION DATE: 04-Apr-2008 AUM: ₹ 37903.96 Cr
☒ Quant Large Cap Fund Regular Growth (INF196L01A95)	AMC NAME: Quantum Asset Management ... CATEGORY: Large Cap Funds	ASSET-PRODUCT: Equity-Mutual Funds	INSTRUMENT TYPE: Open Ended	INCEPTION DATE: 10-Aug-2022 AUM: ₹ 535.30 Cr

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Goal Planning Tool

Financial Goal Planner

Select Your Goal

House

Car

Marriage

Vacation

Education

Emergency

Retirement

Others

Enter Goal Detail

Goal Name
Shanti Niwas Dream House

Name
Enter Name

Mobile No.
Enter Mobile Number

Email
Enter Email

Portfolio Scanner

Search By: ☐ ISIN Code ☒ Instrument Name

TATA Search client wise

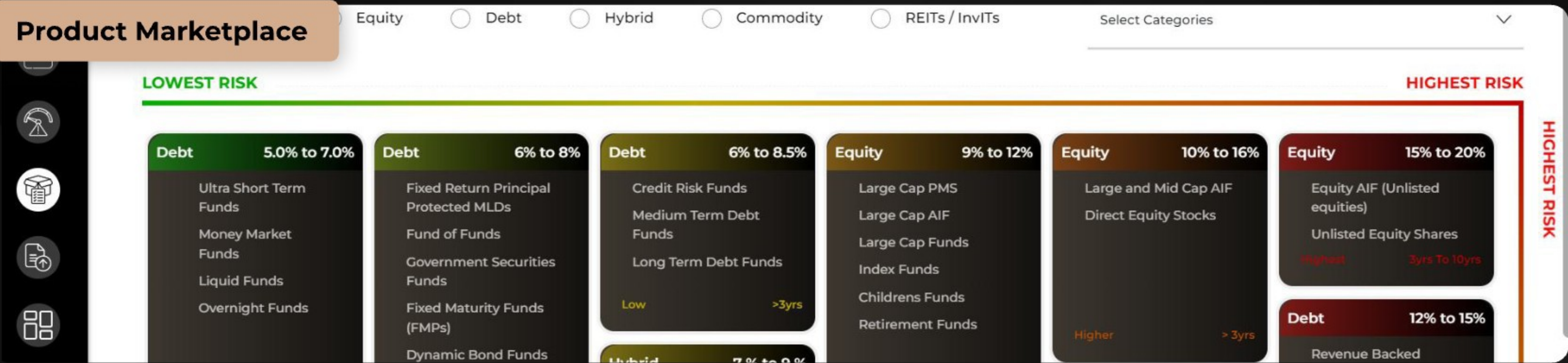
Client Name Products

Sharad Thadani	Mutual Funds - Direct	Mutual Funds - Underlying
Chithra V	Mutual Funds - Direct	Mutual Funds - Underlying
Ishkaran Chhabra	Mutual Funds - Direct	Mutual Funds - Underlying
Abhay Batra	Mutual Funds - Direct	Mutual Funds - Underlying
Pooja Chichkar	Mutual Funds - Direct	Mutual Funds - Underlying
Gaurav Tiwari	Mutual Funds - Underlying	

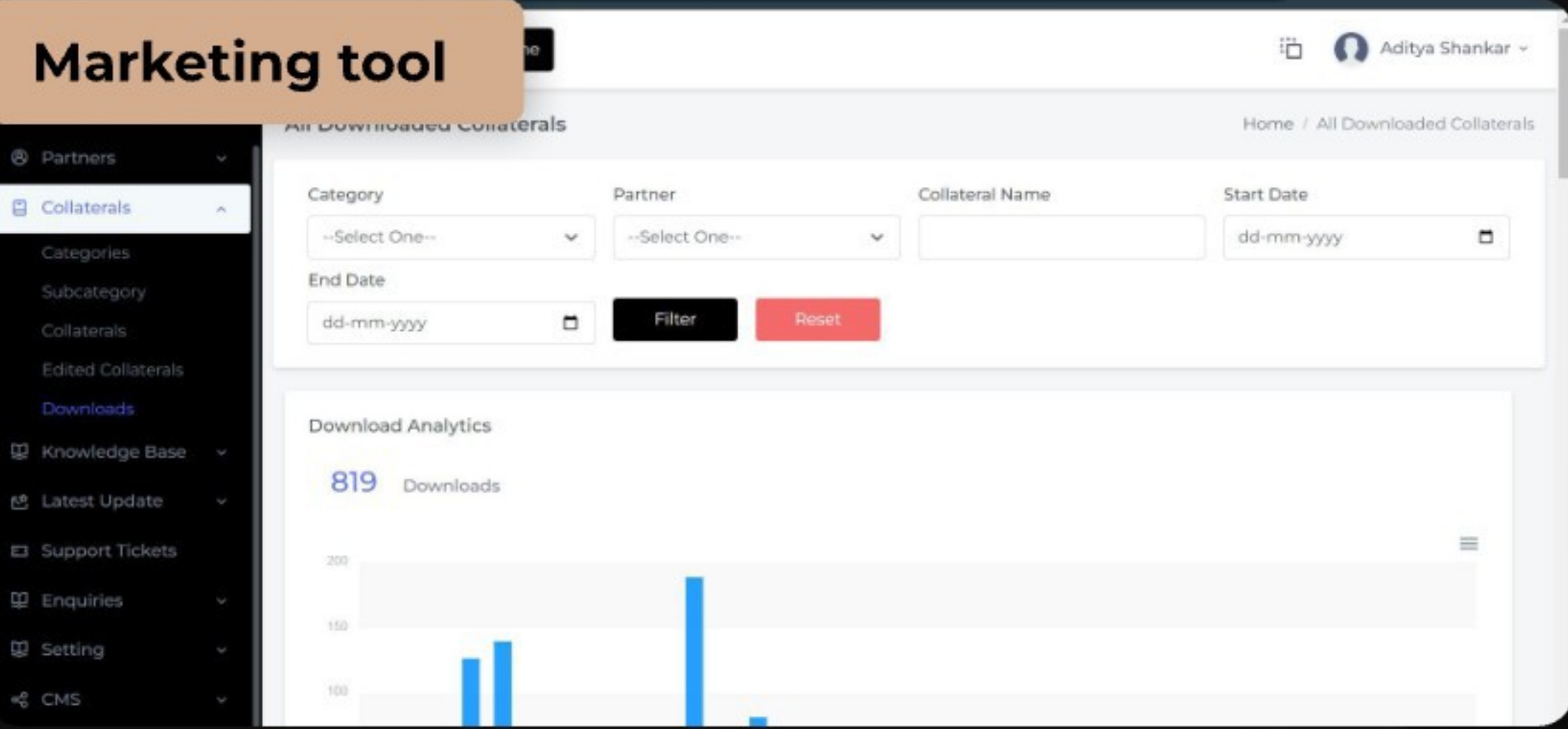
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SUPPORTING TOOLS

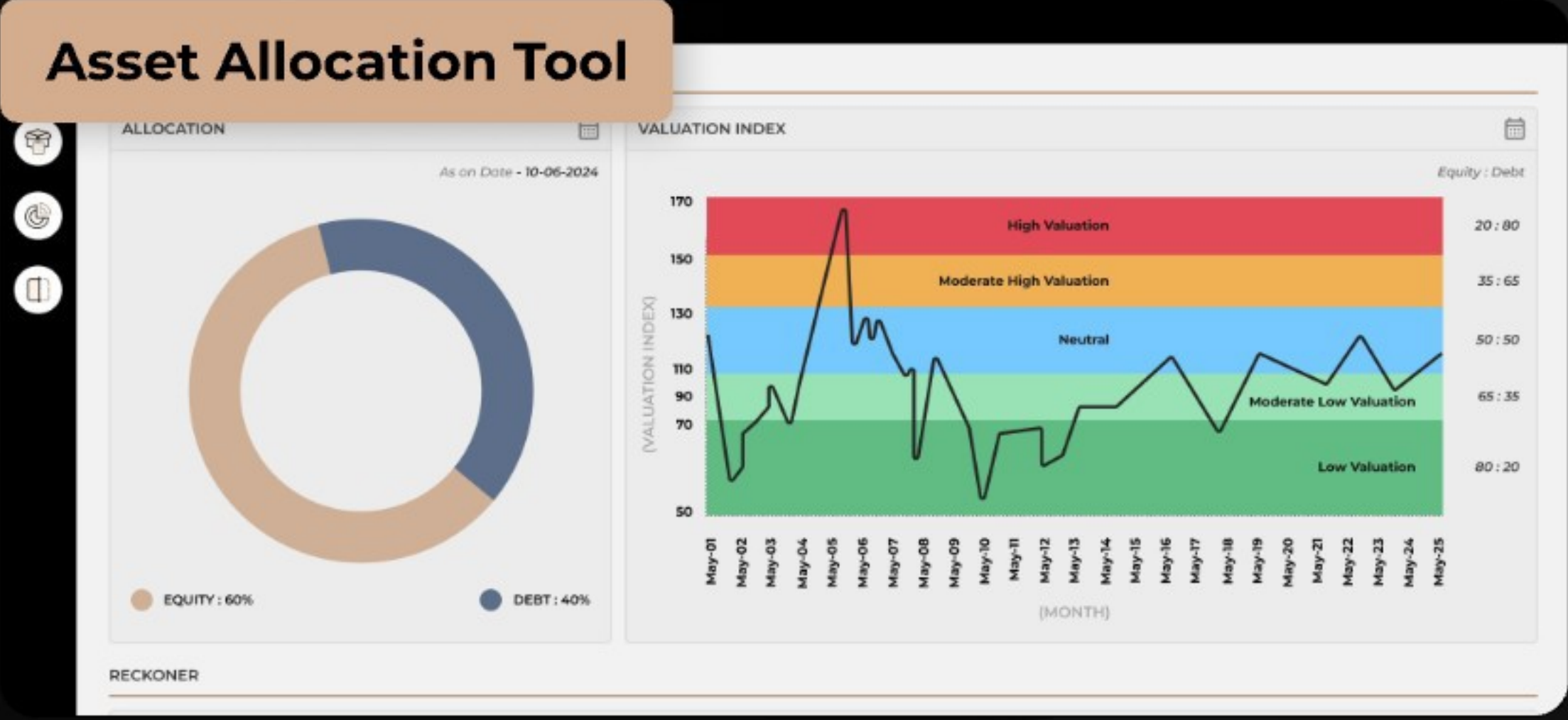
Product Marketplace



Marketing tool



Asset Allocation Tool



INDIA TO BECOME \$10-TRILLION DOLLAR ECONOMY BY 2035: CEBR

Ranking	2021	2022	2026	2031	2036
China	2	2	2	1	1
US	1	1	1	2	2
India	7	6	5	3	3
Germany	4	4	4	5	4
Japan	3	3	3	4	5
UK	5	5	6	6	6
France	6	7	7	7	7
Indonesia	16	16	15	14	8
Brazil	11	11	10	8	9
Russia	12	12	13	13	10

Source : CEBR World Economic League table

India will become the third economic superpower by 2037 and a \$10-trillion economy by 2035, Centre for Economics and Business Research (CEBR), a leading London-based consultancy, has said.

However, over the next five years, the annual rate of India's GDP growth is expected to average 6.4%, after which it is expected to grow at average 6.5% in the subsequent nine years.

BE A PART OF INDIA'S GROWTH STORY, INVEST IN IT.

THANK YOU

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