

FAQs

1. How much experience do you have, and how many market cycles have you managed?

We have a cumulative team experience of markets of around 50 years and we have gone through market cycles from 1993 onwards.

2. Do you have a minimum investment requirement, and what clients do you typically serve?

Minimum investment is as decided by the MF AMCs* or Product companies/manufacturers. We serve Retail clients.

3. Who pays you, me or product companies?

Product companies/manufacturers.

4. Are you AMFI-registered?

Yes. We are registered with AMFI (Association of Mutual Funds of India).

5. Will you update me proactively or only at scheduled reviews?

The market information is shared with clients proactively.

6. How often will my portfolio be reviewed, and what is covered?

Portfolio review is as per the client's requirement or every quarter, whichever is earlier.

7. What team/infrastructure supports you, and how is client confidentiality ensured?

We are a team of six members and all client-related communication is on a one-to-one basis, ensuring adherence to confidentiality.

8. What return assumptions do you use, and over what time horizon?

We do goal-based investing for the long-term. Past performance does not guarantee future performance or returns.

9. What is your investment philosophy - active, passive, buy or hold, or tactical?

Every MF is benchmarked against indices. Every MFs is based on client requirements for their objectives or goals to be met.

10. What is the scope of advice?

We are AMFI* registered MFD and all recommendations into MF schemes are made based on client requirements.

11. What other services are included?

We are partnered for –

Insurance with Prudent Insurance Brokers, with access to life and health insurance products from all IRDA-registered insurance companies.

Fixed Deposits with –

- Shriram Finance Limited,
- Bajaj Finance Limited,
- Mahindra Finance Limited and,
- Sundaram Finance Limited.

MFs with NJ (offering the BSE Star Mutual Fund Platform). We are also empanelled with MFU (Mutual Fund Utilities), a platform created through the collaboration of Mutual Fund Asset Management Companies and MF Central – a single window, industry-level access to all unit holdings.

Estate and Succession Planning –

We provide support to you through our associates who specialise in this area of work on a one-to-one basis and the fees charged will be based on the scope of work provided to the respective Advocate.

*MF – Mutual Funds

*AMFI – Association of Mutual Funds of India

*MFD – Mutual Fund Distributor

*AMC – Asset Management Companies

Thank You!