FUNDWISE

Wealth Management

About Fundwise

Founded in 2007 with over ***50 years of collective investment experience***, Fundwise has provided deeply customised, capital protection advisory services and investment management solutions to clients for over a decade

Fundwise's wealth of expertise lies in the ***diligent team of Chartered Accountants, MBA's and veteran Investment professionals*** specialising in the ***dual proficiency of investment and tax management***

With an ***AUM of INR 1 Billion and growing (Direct + Advisory)*** and ***client centrality*** as its key focus

Fundwise has created *generational wealth* for clients from varied backgrounds such as:

Legacy/ Traditional Business owners

1st & 2nd generation Entrepreneurs

Corporates

Inherited Wealth Management

FUNDWISE

Core Values

Integrity & Trust

All Fundwise operations and decisions are guided by the key core values of integrity and trust providing clients with an assurance of long term sustainable wealth creation

Client Interest First

A core value as well as a key focus area for Fundwise is to provide clients with superior value for all their existing and future investments with a perfect blend of investment expertise and customized client solutions

Entrepreneurial Thinking

Fundwise key strength is providing clients with breakthrough, entrepreneurial and unique solutions catered to their investment needs and requirements

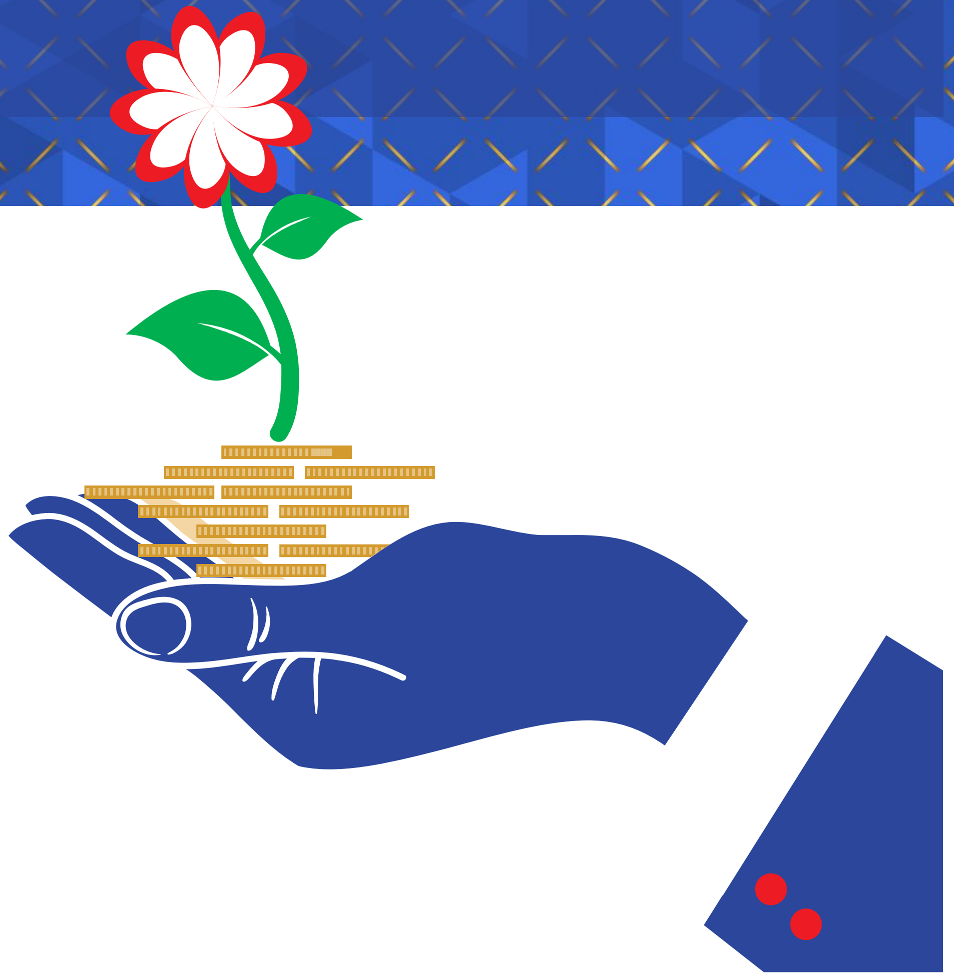
Proven Expertise

With a team of diligent and veteran investment professionals, Fundwise aims to provide capital protection solutions with high returns to all their clients

Our Vision: To be India's fastest growing, most trusted & technologically advanced financial services company providing unique, breakthrough investment and generational wealth management solutions to all clients

Fundwise focus:

- To provide customized, entrepreneurial investment & generational wealth creation solutions
- To provide clients with in-depth, value based investment solutions to create financial long term value
- To provide clients financial confidence & reassurance via consistent performance, investment expertise & client centrality focus



FUNDWISE - Investment Offerings

- Equity, Currency, Commodities (SEBI Registered Broker)
- Mutual Funds (Equity, Debt, Balanced Products)
- Portfolio Management Services (Equity)
- Alternative Investment Products.(Equity, Debt, Real Estate)
- Fixed Income Products (Government/Private Bonds and Deposits)
- Insurance Services (Risk Management)
- Real Estate (Advisory Services)

Investment Philosophy - Fundwise's investment philosophy is to provide client with deeply customized, result oriented investment and wealth solutions for capital protection and wealth maximization

Investment Approach – Triple AAA approach

ANALYZE & ADVISE: Fundwise knows that each client has a unique investment requirement and a different risk tolerance. Fundwise caters to this need by offering a unique investment solution to maximize returns within client risk parameters

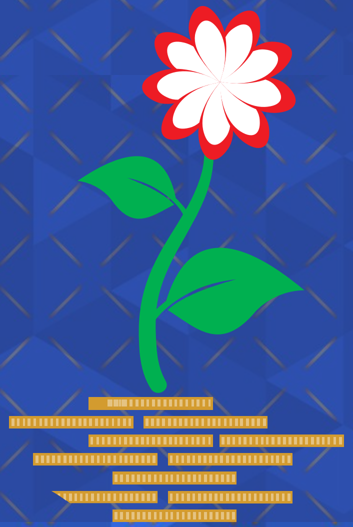
ADAPT : Frequent market changes, new financial opportunities and life events all affect financial planning. Fundwise continuously adapts to the dynamic and changing environments by customizing & revisiting financial solutions for their clients frequently

ACHIEVE : By providing in depth consultative approach, Fundwise helps clients make adjustments as and when necessary, to help maintain their financial progress and end goals

Investment Advisory Model

Our products and processes diligently researched, thoroughly vetted and offered to our client based on our proprietary advisory model:

1. Client Financial Requirement Discussion
2. Client Profile Analysis
3. Client Risk Tolerance Assessment
4. Identification of research & performance based third party solutions to cater to client financial needs
5. Consultative & Customized Financial Investment Advisory
6. Client approved financial strategy
7. Implementation and Execution of approved Financial Strategy
8. Daily Reports & Milestone Updates



Fundwise Team – Founders

Jimit Majithia, CA

With more than 14 years of Financial Services, Taxation , Auditing and Compliance experience, Jimit is a certified Chartered Accountant. Jimit has been advising UHNI's, HNI's and corporates on Investment & fund raising requirements since 2004. His deep understanding of various investment products has helped clients generate superior capital protected returns with maximum risk protection

Kunal Thakkar, MBA

Co-Founder Kunal Thakkar brings over a decade of rich experience in investment advisory for Mutual Funds and Debt Products. Kunal's passion for the financial sector and investment models gives him strategic expertise to ensure client investments are matched to the right asset class. Responsible for the Fundwise business distribution, Kunal is a MBA from the prestigious SP Jain Institute of Management, Mumbai

Fundwise Team & Presence

Fundwise consists of a steadfast experienced team of investment professionals, committed to the Fundwise values and investment philosophy. By catering to clients for over a decade, the team has proven expertise in providing clients maximum value at minimum risk

Offices present in : Mumbai Pune

Clients in : Mumbai • Pune • Delhi • Bangalore • Ahmedabad • Australia • USA • Dubai

Client Testimonials

"I have trusted Fundwise with my investment requirements for over 15 years. Jimit & his team's expertise has protected my initial capital and made it grow multiple fold across various investment cycles. ***The integrity & focus portrayed by the team*** has reassured me time and again during difficult financial times"

- Mr. Sunil Sheth, Owner, Sunny Advertising

"Fundwise has been our investment advisory partners for over a decade and half. During this time, what impressed me is the ***single minded focus*** that I have received from Jimit, Kunal and team. I have always been presented with multiple investment options specific to my financial needs at the time thus making me feel confident that my investments are in the right hands"

– Mr. Jaydeo Chokawala, MD, Apple Bakery Machinery Pvt. Ltd.

"Fundwise has used my existing portfolio and maximized my returns without any divestments over our short association. I am overjoyed to be associated with such a confident investment team, who have not only analyzed my financial requirements accurately but proven their expertise by ***providing unique, breakthrough financial solutions***"

Mr. Kanak Shah, Entrepreneur

"For over a decade, Fundwise has been advising us on our investment requirements singularly. With their ***proven expertise***, Fundwise has not only safely guided our financial portfolio through troubled times but has ensured high returns along with it"

– Mr. Kunal Karia, Partner, TK Ruby and Co.

Disclaimer

General Risk factors

- All investment products attract various kinds of risks. Please read the relevant Fund Document/ Client Agreement carefully before investing.

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