



**INVEST EDGE  
FINMART**

# **Invest-Smart** with Invest Edge and **Bring Happiness** Home



## **Our Service Offerings**

Financial Planning

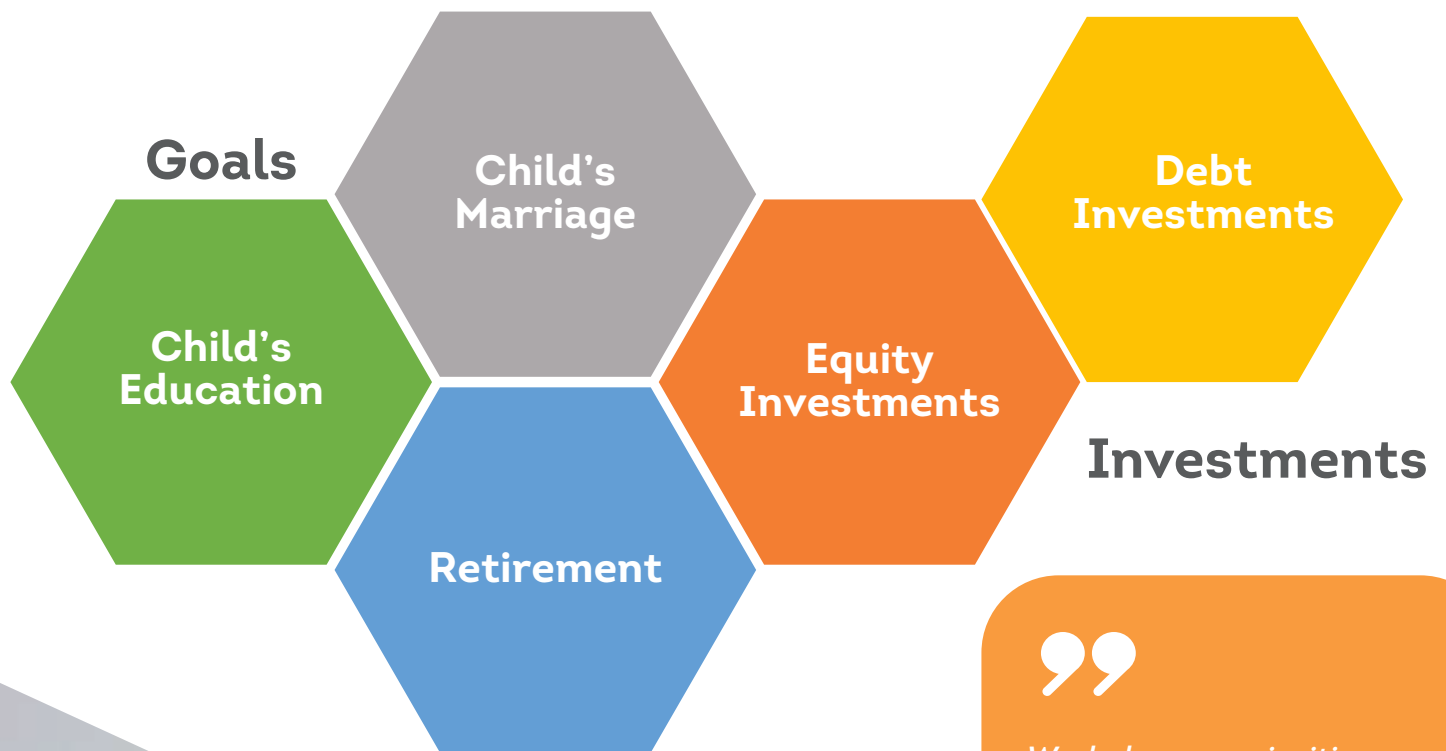
Investments

Insurance

Structured Products

# Financial Goal Planning

- Financial Goals Identification
- Prioritising the Financial Goals
- Tax-Efficient Investment Planning
- Insurance Planning



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*We help you prioritize your life goals and advise on comprehensive investment and insurance planning & execution so that your hard earned money is working as hard as you are working to earn this income*



# Our **Investment** Advise Mantra



## Mutual Funds

### Equity Funds

**Risk Element:**

- High Risk

**Returns Expectation p.a.:**

- 12% p.a. + +

**Ideal Time Horizon:**

- > 5 years

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### Hybrid Funds

**Risk Element:**

- Medium Risk

**Returns Expectation p.a.:**

- 10% - 12% p.a.

**Ideal Time Horizon:**

- 3 - 5 years

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### Debt Funds

**Risk Element:**

- Low to Medium Risk

**Returns Expectation p.a.:**

- 5% - 8% p.a.

**Ideal Time Horizon:**

- 15 days - upto 3 years

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Get a Super Edge in your MF Investments with our high quality research & analysis to generate best Risk Adjusted Returns on your Investment

# Equity Shares


## → Special 26 Equity Shares Strategy

Specially crafted Multi Cap Portfolio of 26-30 high quality Equity Shares to generate long term wealth

 (5 - 7 years time horizon)

## → Monthly Equity Shares Strategy

Systematically invest upto Rs. 50,000/- every month in specially crafted portfolio of Equity Shares to earn superior returns

 (5 - 7 years time horizon)

## → Nifty Xtraa Edge Investment Strategy

A unique investment strategy to give you Capital Protection and Higher Returns than Nifty over the Long - Term

 (3 - 5 years time horizon)

## → Sectoral Edge Trading Strategy

A unique short-term investment strategy betting on Equity Shares belonging from sectors which are out-performing the markets

 (Investment time horizon of up to 1 month)

Join forces with us & be a part of wonderful  
long term wealth creation journey

# Corporate Fixed Deposits



## Safety

Invest in FDs of Companies with "AAA" highest credit rating

HDFC Limited, Bajaj Finance, M&M Finance, STFC, etc



## Liquidity

Investment time horizon of 12 - 60 months

Choose Tenor based on your liquidity requirements



## Returns

Earn fixed returns between 6.5% - 8% p.a.

No need to worry about market volatility

# Structured Products

## Debt Investments

- Non-Convertible Debentures
- PTP Lending

## Equity Investments

- Portfolio Management Services
- Investments in unlisted shares

## Gold Investments

- Sovereign Gold Bonds
- Gold Pass Through Certificates

Structured Products usually carry a higher risk and therefore are **more suitable for investors with higher risk appetite and higher capital in order to earn superior returns over long term**

# Tax Savings Investment Products

## National Pension Scheme

(Contribution up to Rs. 50000/- p.a. qualifies for additional tax benefits)

## Capital Gain Bonds

(Can invest up to Rs. 50 lakh in a F.Y. to save long term capital gains tax)

## ULIP & Money Back Policies

## ELSS Schemes of MFs

(Sec 80c)

## Term Insurance

(Sec 80c)



# Insurance

## Product Offerings

### → **Term Insurance** with Annual Income starting from Age 55

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~ A NIL Cost Term Plan providing a high Sum Assured in Case of any Unforeseen Eventuality and Guaranteed Tax-Free Annual Income During Old Age

### → **Guaranteed Savings Plans**

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~ You invest for 15 years and get following benefits:

1. Guaranteed up to 12% returns every year for the rest of whole life starting from 16th year.
2. Increasing Insurance Cover on your Life
3. Capital Appreciation in excess of 10-12% p.a. over the long term

### → **Term Insurance** with Wealth Creation

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~ Get Up to 100 - 200x Sum Assured of annual premium and Up to 21x Maturity Sum Assured (Tax-Free)

### → **Business Insurance**

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~ If you are a Director or Employee of Private Limited Company - we have designed a special insurance solution for you to enhance tax planning and get a high insurance cover for Life

## General Insurance

- ~ **Car Insurance**
- ~ **Travel Insurance**
- ~ **Property Insurance**
- ~ **Fire Insurance**



# Who we are? Why choose us?

## Education Qualifications

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C.A. | MBA | FRM | CFP | PGDIB

## Experience

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- More than 15 years experience in the financial services industry
- Very good understanding about financial markets and investment & insurance products
- Excellent network of Companies offering the best investment & insurance products in the market.

## What you get

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- Seamless **online mode** to do most of the investment transactions.
- **Mobile App** for tracking all your investments at one place
- **Monthly Portfolio Performance** Reports & Annual Capital Gain Reports
- Half Yearly / Annual **review of investment performance**
- **Regular updates** about the best investment products
- **Claim Support** through our Network partners for any insurance products

## Our Network Partners

### Mutual Funds

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### Equity Shares

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### Insurance

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Get in touch with us

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