Group Profile

www.rathi.com

ABOUT

Mr. Anand Rathi and Mr. Pradeep Kumar Gupta laid the foundation of the Anand Rathi Group in 1994. From setting up a research desk in 1995 to starting a capital market lending business, we have always kept the client at the centre of our plans.

With roots over 30 years deep, we have carved a niche in the financial services sector. The Anand Rathi Group offers a wide spectrum of services ranging from Investment services across Asset classes to Private Wealth, Institutional Equities, Investment Banking, Insurance Broking and NBFC.

Powered by integrity and an entrepreneurial spirit, we have been able to provide a peerless experience to our clients. We believe every client needs a unique financial solution. A customer-first approach coupled with digital innovation is our answer, which helps us contribute to the client's financial wellbeing.

GROUP PHILOSOPHY

"To be a leader in investment advisory, provide innovative financial solutions & be the first choice for clients and employees"

Vision

"We are client centric, with a clear focus on providing long-term value addition to clients, while maintaining the highest standards of excellence, ethics & professionalism"

Mission

CORE VALUES

Family Culture

Integrity (Ethics)

Entrepreneurial Organisation

OUR JOURNEY

Established 1994

Mr. Anand Rathi and Mr. Pradeep Gupta founded Anand Rathi Group

1995

- Setup a Research desk and empanelled with major institutional Investors
- Introduced Investment Banking Business, Lead Manager First IPO

2001

- Initiated Wealth Management Services

2003

- Initiated Insurance Broking, Commodities Brokerage and Real Estate Services introduced

2005

- Initiated Capital Market Lending Business

2013

5 CONSECUTIVE YEARS
BEST DOMESTIC PRIVATE BANK, INDIA
2009 2010 2011 2012 2013
ASIAMONEY Private Banking Polls

2016

- Initiated Construction Finance Business.
- Acquired Freedom Financial Planners.

2017

- Acquired Religare's Wealth Management Business.
- Initiated Digital Wealth Management Services.
- Initiated SME Finance Business.
- Initiated Anand Rathi IT, Jodhpur.
- Initiated reinsurance Business

2020

- Initiated Global Investing Services through Gift City (IFSC)

2021

- Anand Rathi Wealth Limited got listed on BSE & NSE

2022

- ARSSBL,ARWL & NBFC gets certified as Great Place to Work 2022
- Anand Rathi group gets accredited as one of the Most Preferred Workplace

OUR REACH

1

Serving over 6,00,000 clients

2

4000+ dedicated employees & 2500+ Associates & Partners

3

1100+* outlets across 370+ cities

*Including Franchise locations

PROMOTER GROUP

Anand Rathi

Founder & Group Chairman

Mr Anand Rathi is the founder and the soul of the Anand Rathi Group. The Gold Medallist chartered accountant is a leading financial and investment expert in India and the broader South-East Asian region. Before laying the foundation of the Anand Rathi Group, Mr Rathi had an illustrious and fruitful career with the Aditya Birla Group.

In 1999, Mr Rathi was appointed the president of BSE (Bombay Stock Exchange). The rapid expansion of BOLT - the BSE Online Trading System, during his tenure, speaks volumes of his farsightedness. He also set up the Trade Guarantee Fund and played a vital role in setting up the Central Depository Services (CDS). Mr Rathi is an esteemed member of the ICAI and has experience of about 6 decades across sectors.

Pradeep Gupta

Co-Founder & Group Vice Chairman

Mr Pradeep Gupta, the co-founder, is the fuel that runs the well-oiled Anand Rathi machinery spread across India. Starting with a family-owned textile business, Mr Gupta stepped into the financial world with Navratan Capital & Securities Pvt. Ltd. After scaling up the business, Mr Gupta later joined hands with Mr Anand Rathi to establish the Anand Rathi Group.

He played an instrumental role in the success of the Institutional Broking and Investment Services arms of the group and remains the driving force behind the strong network of franchisees and branches across the country. He has over 3 decades of experience in financial services. Mr. Gupta is also an active member of Rotary Club of Mumbai.

PROMOTER
GROUP

Priti Rathi Gupta
Board Member

Mrs Priti Rathi Gupta laid the ground for the success of the Commodity and Currency Trading and Forex Advisory Business at Anand Rathi. Mrs Gupta did not limit herself to the financial sector and set up Ishka Films to satiate her entrepreneurial and creative urges. She utilised her expertise in financial services to give birth to a path breaking product-LXME. The platform helps women achieve their dreams and overcome financial fears.

Supriya Rathi
Managing Director

Ms Supriya Rathi holds an MBA in Finance from Leonard N. Stern School of Business, New York University. In the initial phase of her professional career, she worked in retail banking and equities research wings of leading financial firms like Hong Kong Bank and Solomon Smith Barney (now a part of CitiGroup). Ms Rathi has amassed a rich experience of over 12 years in the financial services sector. Her pioneering initiatives are the backbone of the Anand Rathi Group's Insurance Broking business.

ANANDRATHI

Private Wealth. uncomplicated

Wealth Management

(Private Banking)

anandrathiwealth.in

PRIVATE WEALTH

Anand Rathi Wealth Limited, a newly listed company, has, since 2002, been in the business of Private Wealth, catering to high-net-worth individuals (HNIs). We are also registered with AMFI as a Mutual Fund Distributor overseeing AUM of over INR 55,057+ crores across 9,641 families in India and globally. We have over 322 Relationship Managers operating from 15 locations – Bengaluru, Chandigarh, Chennai, Delhi, Gurugram, Hyderabad, Kolkata, Mumbai, Noida, Rajasthan, Pune and a representative office in Dubai.

We focus on uncomplicating the entire process of Private Wealth for our clients so that they can choose the best investment option available to make the right investment decision. Our focus on building long-term relationships defines our business. Our core values of being fearless, providing data to make decisions, uncomplicated & transparent approach make us a trusted partner in our client's investment voyage. We provide the appropriate financial data for our clients to understand the probability of achieving their decided wealth goals. We help in planning the safety nets to protect one’s wealth from any unforeseen circumstances. We also build an estate plan to ensure near-zero transmission loss while transmitting wealth to the next generation.We have been certified as a 'Great Place to Work', five times in a row, which endorses the culture at our organization.

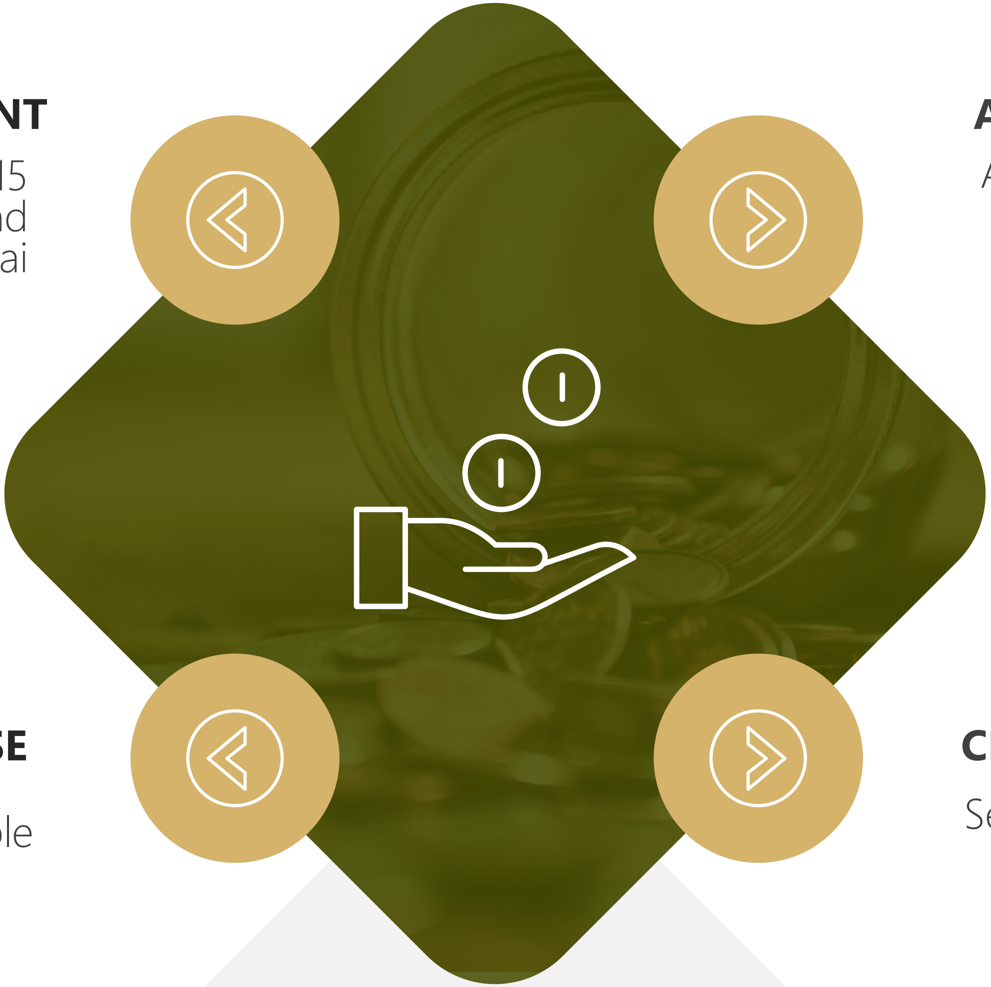
OUR NETWORK
STRENGTH

FOOTPRINT

Spread across India with over 15 wealth management centres and an office in Dubai

ASSETS UNDER MANAGEMENT

AUM of over **Rs 55,057+ crore**



EMPLOYEE BASE

Strength of over 963 people

CLIENT SET

Serve over 9641 clients

31st December 2023

LEADERSHIP

Leaders

- Mr. Rakesh Rawal is the Director & Chief Executive Officer at Anand Rathi Wealth Limited.
- Has over 4 decades of experience in banking, finance and wealth management.
- He has previously worked with Hindustan Unilever and Deutsche Bank and
- Rakesh has a Bachelor of Technology degree in Mechanical Engineering from the IIT, Kanpur and a Masters of Management Studies degree from JBIMS

Rakesh Rawal

Chief Executive
Officer

- He is the youngest Deputy CEO in the private wealth industry. Being the 4th among the top wealth managers in India, Feroze manages assets worth over Rs. 1,200 crores for large families and senior management professionals.
- Feroze's most significant contribution to the industry is in the revolution of structured products through the application of derivatives as a risk management tool. Due to his vision, the company has the highest market share of 38.6% in the on-going issuance of structured products.

Feroze Azeez

Deputy
Chief Executive Officer

PRODUCTS & OFFERINGS

SHARP SEGMENTATION

We focus on the under-served and the less price-sensitive high net worth individual (HNI) segment, with an AUM potential of Rs 5 crore - Rs 50 crore

UNCOMPLICATED & HOLISTIC SOLUTIONS

We provide uncomplicated, holistic & standardised solutions to clients based on an objective-driven approach. It is a top tier non-banking MF distributor, coupled with a presence in MLDs

SAFETY NET CREATION

Creating a liability-free asset to safeguard against external risks, so that the client's family members are protected.

ESTATE PLANNING

Establishing a precise estate plan to ensure near-zero transmission loss of wealth from one generation to the next.

NBFC

anandrathiglobal.com

NBFC
SERVICES

Anand Rathi Global Finance Limited was incorporated on February 3, 1982. The Company is a subsidiary of Anand Rathi Financial Services Ltd. The Company is registered with Reserve Bank of India (RBI) as non-banking finance company (NBFC) and classified as a Credit and Investment Company and categorized as 'Systemically important non-deposit taking non-banking financial company' (NBFC-ND-SI).

ARGFL is mainly offering Loan against Property (SME Funding), Loan against securities (including Shares, Commodities, Mutual Funds, Bonds, ESOPs and other liquid collaterals) and Project Financing. ARGFL has ambitious plans to expand its fund based activities primary to provide value added products / services to the large client base of the Group.

Armed with a team of qualified professional with diversified industry exposure, the company has been growing progressively. Over the last 40 years, the company has witnessed dynamic market cycles, policy changes and evolution of the financial markets. The NBFC arm has been the backbone of the entire group and is growing exponentially.

OUR NETWORK STRENGTH

Footprint – Spread across 9 locations in India

Employee Base - We have an employee base of 450+

At present the total Asset size of NBFC is about INR 13000+ Cr.

31st December 2023

LEADERSHIP

Mr. Jugal Mantri is the Director and CEO of Anand Rathi Global Finance (ARGFL), the Group's non-banking financial services company. He has been with the Group since 1994 and played an integral role in shaping the Group as one of India's leading financial institutions. He is leading the Group's lending arm ARGFL with his diverse experience and expertise across the financial spectrum. Besides this, he is also responsible for the overall financial management of the Group, including fund/capital raising, corporate accounting and management, financial planning and analysis, corporate treasury, corporate investments and taxation.

Jugal Mantri started his professional journey with M/s. Haribhakti and Co. as an Article Trainee and subsequently completed industrial training with Tata Finance Ltd. He is a rank holder Chartered Accountant and has done Senior Management Programme from IIM Ahmedabad. Mr. Mantri has over 3 decades of experience in corporate sector.

JUGAL MANTRI

Director and CEO

PRODUCTS & SERVICES

SME:

SME lending was launched in the year 2017 for lending to businessmen, traders, proprietors, manufacturers and professionals. ARGFL began the SME Lending business in Mumbai and has now expanded its footprint in markets like Delhi, Bengaluru, Jaipur, Pune, Jodhpur, Thane, Vashi & Ghaziabad.

Loan against Securities:

Loan against Shares offers the instant liquidity. It helps in sourcing funds for any personal requirements or to increase holding/ investment in listed collaterals and a person does not have to sell their securities

Construction Finance:

Launched in the year 2016, the Construction Finance arm of ARGFL lends to real estate builders who are in need of funds to complete an ongoing project. We have presence in markets of Mumbai, Pune and Bangalore.

Treasury :

ARGFL has an active treasury consisting of fixed income and equity instruments. The treasury portfolio majorly comprises of Government securities. Also, ARGFL is one of the leading Non-banking financial company present in the G-Sec market.

ANAND RATHI
INVESTMENT SERVICES

Investment Services

anandrathi.com

INVESTMENT **SERVICES**

We cater to the financial requirements of individual clients with a focused approach. We provide expert research and advisory to increase the probability of maximised returns on client investments.

We provide the finest research across segments and meticulous investment assistance so that clients get the right investment recommendations and take calls on their investment strategy.

We offer our customers wide array of products across various asset classes. Our Investment Services caters to wide variety of clients. We offer high-tech digital apps and platforms as well as physical touch points through which our customers can Invest in their desired asset class.

To efficiently cater to the specific requirements of specific client type we have various channels like Online, Branch, PCG, Preferred and Privilege.

OUR NETWORK **STRENGTH**

1. 6 Lac + Registered Customers
2. 1800+ Direct Employees
3. 85+ Own Branches
4. Strength of 2500+ Business Associates/Partners
5.

31st December 2023

LEADERSHIP

Mr. Roop Bhootra is the CEO of the Investment Services wing at Anand Rathi Group. Mr. Roop Bhootra is a rank holder Chartered Accountant and began his career with the Anand Rathi group in the year 1995. He has over 25 years of Capital Market experience in the field of Building businesses, Creating Business Strategies, Sales, Operations, Process management, Accounting, Risk Management, and Technology upgradation.

His core focus includes Business expansion, People Management, Key Partnership Development, and Tactical market planning. Under his spearheading leadership, the Broking & Distribution business has grown at a rapid pace

ROOP BHOOTRA
CEO, Investment Services

PRODUCTS & SERVICES

BROKING Equity | Derivatives | Commodities | Currency/Futures | IPO

DISTRIBUTION Mutual Funds | Corporate Fixed Deposits | Structured Products | NCD/Bonds | Portfolio Management Services

FINANCING Margin Trading Facility

ADVISORY Smart Basket | Wills & Trusts | Forex Advisory

ANANDRATHI
INSTITUTIONAL EQUITIES

Institutional Equities

INSTITUTIONAL EQUITIES

Anand Rathi Institutional Equity is a full-service institutional brokerage. Anand Rathi Institutional Equity offers fundamental research in 200 listed companies and execution in both cash and derivatives and platforms such as algorithmic and DMA trading. The firm and the team members are highly rated by most leading institutional investors and score high ranks in polls conducted by independent agencies such as Institutional Investor and Asia Money.

Anand Rathi Institutional Equity mainly focuses on mid-cap companies with strong fundamentals, existing/ potential client interest but substantial information gap between the company and institutional investors due to the lack of quality coverage by other brokers. Deep understanding of business model and financials of coverage companies backed by domain knowledge and interaction with company, partners, competition, suppliers, customers and other stakeholders. Nearly 200 companies are under active coverage. This to go up to 250 in the near-term. Anand Rathi provides end-to-end servicing – objective research, corporate access, channel checks and stock sourcing/ placement – on all these stocks. With institutional clients base, corporate connect, synergies with other Group companies and experienced dealing team, Anand Rathi Institutional Equity has the unique capacity to source/ place relatively illiquid mid-cap stocks at low impact cost.

OUR NETWORK STRENGTH

1

Employees

Over 60 employees across the function

2

Robust Research

Team of 25 analysts with average experience of 12 years

3

Client Base

Clientele in India, Singapore, Hong Kong & the US

LEADERSHIP

Vishal Laddha is a qualified chartered accountant and has been with the group since its inception. He has over 27 years of experience in trading. He is one of the most well-known and trusted sales traders in the industry for the past two decades. His unique ability to source and place relatively illiquid stocks at low impact cost drives a large part of the Group's institutional equity business.

He has nurtured and developed a very strong Trading, Research and Operation team to cater Domestic as well as FII clients.

VISHAL LADDHA
CEO, Institutional Equities

PRODUCTS & SERVICES

Theme/ Sector Report

Medium-term assessment of coverage companies within an industry/ niche. Also cross-sector reports based on a theme (e.g. leverage, export-orientation) or significant event (e.g. policy change). The economy/ strategy team also brings out theme reports with sector analysts

Initiating Coverage Report

Comprehensive coverage of a company including industry dynamics, company positioning, business model, financial performance and prospects, valuation, forensic assessment, management background, corporate governance and price performance

Special Coverage Report

Focus on non-recurring economy-wide, regulatory or industry/ company-specific significant events. The equity team's interactions with a company, experts, stake-holders or any other entities providing new insights into a sector or company also result in special reports

High Frequency Report

Apart from a daily morning note, these reports cover recurring information and data releases by the government, companies or other sources. Even for these reports Anand Rathi focuses on assessment rather than reporting of the new information

ANANDRATHI
INVESTMENT BANKING

Investment Banking

INVESTMENT BANKING

Established in the year 1995, Anand Rathi Investment Banking has evolved as an 'Advisor of Choice' for corporates and investors. A deep understanding of Indian markets and domain knowledge, coupled with strong track record of deal advisory, has positioned our Investment Banking practice as the leading advisor focused on India's vast and growing consumption story.

Anand Rathi Investment Banking over the years has evolved into a leading partner for emerging growth companies. It has acted as a house banker for some of the stellar growth stories that have over time become leaders in their segments within the Indian capital markets. Our approach is to build trusting relationships and provide advice and solutions for our clients that results in value creation for all stakeholders over the long-term.

The team consists of seasoned professionals from varied industry backgrounds and with relevant domain knowledge. We have successfully executed some of the most complex and novel transactions to meet specific challenges and opportunities for clients and investors.

Rather than pushing standard products, our strategy is to advise clients with customized solutions after thorough research and analysis. For every situation; the specific needs vary and we work alongside our clients to meet their needs and add value to their business. We help them embark on the right strategy/product which is often customized for each client. Our strong presence across corporate finance and equity capital markets ensures we always recommend what is needed and not limited to what is offered.

With a strong track record of successful transactions backed by stellar institutional research, strong public market distribution, exhaustive sponsor coverage and a global network, the firm has built formidable market credibility. Our best reference is our clients and the relationships we have nurtured with leading growth companies over the years.

OUR NETWORK STRENGTH

25 years of rich experience

25 member team of product experts and specialists

Catering to **a wide range of sectors including -**

- Consumer
- Retail
- Education
- Information & Technology
- Financial Services
- Healthcare
- Cement

LEADERSHIP

Samir Bahl is the CEO & Head of Investment Banking at Anand Rathi Advisors Limited and a part of the Anand Rathi Group's Management Committee. He was previously Executive Director & Head of Investment Banking at Centrum Capital as well as Co-Founder of Polymath Advisors.

Samir has an MBA from the University of Rochester's Simon School of Business in the US. He became Managing Director at Thomson Financial based out of New York. He was then assigned the responsibility of building Thomson Financial's India operations as Country Director. Post that he undertook a similar assignment as India Country Head for Omgeo, a Thomson Financial Joint Venture with the DTCC.

Samir has spoken at several capital markets and investor related conferences internationally including in the US, Europe and Asia.

SAMIR BAHL
CEO, Investment Banking

PRODUCTS & SERVICES

EQUITY CAPITAL MARKETS

Public Issues, Qualified Institutional Placements, Rights Issues, Offer for sale, Buyback, Delisting, Open Offer etc.

PRIVATE EQUITY INVESTMENTS

Raising growth capital from reputed Indian and offshore investors

MEZZANINE/QUASI-EQUITY CAPITAL RAISING

Raising capital through Structured Products such as non-convertible debentures, structured bonds, hybrid instruments etc.

MERGERS & ACQUISITIONS

Domestic as well as Cross-border business sale, takeovers, mergers, acquisitions, brand partnerships, national/international joint ventures etc.

ANAND RATHI
INSURANCE BROKERS
Design. Deliver. Delight.

Insurance Broking

anandrathiinsurance.com

INSURANCE **BROKING**

Anand Rathi Insurance Brokers Ltd. (ARIBL) Licensed by Insurance Regulatory and Development Authority of India (IRDAI) in the year 2003, We are one of the leading Insurance broking houses in India and also have a global presence. We have a strong team of insurance professionals dedicated across major metros in India. We provide customized insurance advisory across industries on the entire gamut of insurance products. Our products include the standard Property & Engineering insurances, bundled products such as Banker's Blanket Bonds, Crime Insurance, Error and Omission Covers, Marine covers, Employee Benefit plans, liability policies such as Directors & Officers Liability, Product Liability, Commercial General Liability and other types of insurance covers across industry sectors like Manufacturing, Infrastructure, Banking and Chemicals Industry.

ARIBL provides end to end solution to our valued corporate clients. We place our clients first and strive to set the highest standard of quality in everything we do. Our client proposition can be summarized as specialized expertise, client advocacy, tailored innovative solutions and service excellence. At ARIBL we have a robust IT platform that possesses the requisite skills to deliver what we promised.

OUR NETWORK STRENGTH

Footprint – We have 17 branches across the country

Employee Base - We have an employee base of more than 310

Over 20 years of industry experience with over 500+ active corporate clients

Tie up – All Major Insurance Companies in India

LEADERSHIP

Rrajesh has over 25 years of rich experience. He began his career as a Senior Sales Engineer at Premier Irrigation Equipment Ltd., New Delhi prior to joining Mahindra & Mahindra (Tractor division) in 1998, where he worked as Manager - Channel Development at Bhopal and Karnal Offices till 2001.

In 2003, he moved as part of the founding team of Mahindra Insurance Brokers where he worked for 17 years, prior to joining us. At Mahindra, Rajesh was heading all verticals including corporate sales, retail as well as reinsurance. He was Principal Officer of the firm since 2019.

RRAJESH SHARRMA
CEO & Principal Officer

PRODUCT & SERVICES

NON-LIFE INSURANCE

- Pioneer in devising customized solutions for clients through innovative products such as Cyber Insurance, Title etc.
- Recommend risk improvement and loss minimization measures
- Structure product and design covers that meet the specific requirements of customers
- Provide risk management and insurance education
- Flexibility to choose General Insurer of client's choice
- Strong relationship with Insurance Companies
- Pre and Post sales service to customers
- Unbiased; research driven choice of insurance products to all our clients
- Customized Corporate Consultancy backed by strong team of experts

LIFE INSURANCE

- Highly trained team of professionals to get the right solution for all insurance needs
- Full service set up to cater to all insurance requirements including Financial Protection, Child Education, Wealth Creation or Pension Planning
- Tie-up with all the major insurance companies in India
- Flexibility to choose Life Insurer of Customers choice
- Dedicated assistance for claims processing & documentation

AR DIGITAL WEALTH
AN ANAND RATHI COMPANY

Digital Wealth

DIGITAL WEALTH MANAGEMENT

AR Digital wealth ("DW vertical") is a fin-tech extension of our proposition, born from the extensive learnings from experience in the Private Wealth solutions. The idea was to address the large mass affluent segment of the market with a wealth solution delivered through a ‘phygital channel’ i.e a combination of human distributor empowered with technology. It seeks to build a scalable and profitable model by using this blend of technology capabilities and human interface.

This segment of the business was launched in 2016 and in a short time frame has seen encouraging results in its attempt to build a ‘Partner’ led distribution model through whom a packaged investment solution is delivered. ‘Partners’ are IFAs and AMFI registered Mutual Fund Distributors who are seeking to grow their business by taking the Anand Rathi brand, product research, selection and investment insights to their clients through an innovative easy-to-use technology interface. The business is also in the process of building a remote direct sales team that will be able to deliver this proposition using virtual channels and on-board the client through its online account opening process.

OUR NETWORK STRENGTH

AUM	01	About Rs 1,491+ crores of Assets Under Management
CLIENTS	02	Catering to over 4650+ Clients Managed
PARTNERS	03	Over 396+ Client Engagement Partners
EMPLOYEES	04	48 Member Team

31st December 2023

PRODUCTS & SERVICES

The offering has a *DEDICATED CLIENT MOBILE APPLICATION* and that is the primary mode of engagement between the partner and the client. This enables a single Partner to service a larger number of clients even though the client segment has a lower average AUM size. This results in positive unit economics of the business. We believe this model is highly scalable with a disruptive channel strategy since is not dependent on its geographical presence and can reach cities where physical scalability may not be cost effective

OFA PLUS
Omni Financial Advisor

FIINFRA-OFA

fiinfra.in

- OFA is designed, developed and maintained by FIINFRA which was started in the year 2014 and now a 100% subsidiary of Anand Rathi Group. It is with an aim to empower MFDs digitally for better client engagement. Our mission to forge a long-term partnership with the MFDs by strengthening and growing their business by providing visibility, increasing efficiencies and integrations for smooth communication.

- OFA as a platform is designed to equip MFDs with better and systematic technology to meet the needs of technology enabled investors by assisting them in conducting their manual work – Digitally.

- It is a complete business infrastructure for MFDs who are looking to make a difference in their client's life and create an edge for their business.

- We thrive to deliver a reliable experience to OFA users as we provide a base for MFDs to work on web-based and mobile application in order to help them stay ahead of competition.

- Automated Query Management System and regional language-speaking service experts constantly engage every subscribed MFD with the features and benefits of the product.

- We are a well-trained and competent team consisting of support, tech, operational and business development to ensure that every MFD is well trained, handled, guided and equipped with our benefits and technology to leverage their business to full extent to achieve their overall business growth and create their own brand value.

OUR NETWORK STRENGTH

Over 5932+ Subscribed MFDs

Over 20.02L+ Lacs combined Client Base

Over Rs 124410+ Cr combined AUM

31st December 2023

LEADERSHIP

An Engineer and MBA with over 25 years of experience. Mr. Sahu assumed the role of CEO in the year 2014. Prior to joining FIINFRA, his work experience spans across industries like Advertising, Marketing and Financial Services. In FIINFRA, he has played a key role in designing and building the technology platform – OFA for MFDs.

He is known for his commitment towards a culture of customer centricity, reputation for building long-term customer partnerships and bringing innovation. Under his leadership, OFA has acquired and retained a niche customer base spanning across the country and, is known as the fastest growing platform providers for MFDs in the country. In his spare time he likes to read and catch up with Cricket.

BISHNU SAHU

Co-founder & CEO, OFA

PRODUCT FEATURES

Comprehensive & Diverse Reports

In order to keep track of client's investments, a MFD needs to maintain different statements. The wide range of reports available in OFA Plus, enables an MFD to check valuation of mutual funds, transactions done in the past, SIP details etc

Client Engagement Tools

Every Distributor knows the significance of client engagement as it is the one of the key ways to grow practice and retain clients in the long term. OFA Plus has a comprehensive library of diverse categories especially developed for MFDs.

Business Analytics/Dashboards

The dashboard offers a quick and updated status about various statistics whether it is AUM increase, SIP growth or mutual funds data making it a must for IFAs.

Online MF Transaction

Integrated with prominent online transaction portal such as NSE NMFII & BSE StarMF where distributors can initiate transactions through the portal and app in easy steps. Through this feature, distributor can also finish KYC procedure of clients in a couple of minutes and begin investments.

Goal tracking & Analysis Report

The prime role of a distributor is to make sure their clients achieve their objectives in the stipulated time frame. The goal tracking feature helps to monitor client goals. MFDs can accordingly make changes in the financial plan if needed.

RTA mailback service

With the help of auto-upload facility, MFDs can easily upload transaction files from all RTAs. These files contain records of all transactions done by mutual fund investors.

ANANDRATHI
INTERNATIONAL VENTURES(IFSC)
Global Investments Simplified

GIFT City

anandrathigiftcity.com

GIFT
CITY

Anand Rathi International Ventures (IFSC) Private Limited aims to become a leader in providing, the "best and simplified" financial solutions, to our esteemed customers for their investment journey in global markets.
GIFT City (Gujarat International Finance Tec-City) is India's 1st Operational Smart City and IFSC. The purpose of setting up the GIFT City is to develop a world class smart city that becomes a global financial hub with the development of an International Financial Services Centre (IFSC).
GIFT City is an emerging global financial and IT services hub, a first of its kind in India, designed to be at or above par with globally benchmarked business districts. It is supported by state-of-the-art infrastructure encompassing all basic urban infrastructure elements along with an excellent external connectivity.

LEADERSHIP

Niteen is a seasoned professional with extensive experience in Forex Markets, Trade, Working Capital finance, Currencies broking, building businesses and teams. With 20 years in Financial Markets and related activities, he has been associated with organizations involved in various Financial Products.

Niteen is an engineer graduate and holds a management degree from Faculty of Management Studies – New Delhi. He is also an alumni of IIM- Calcutta. With various assignments with banking majors like ICICI Bank (India) , ICICI Bank (Canada), ABN AMRO bank, Angel Broking and RBL Bank he was responsible for business development, engagements with various industry stakeholders, regulators, market participants and government bodies and has an extensive experience in building businesses from scratch across organizations, leading and nurturing teams while also developing strong processes, culminating into leadership positions for organizations he has worked for.

Niteen D
CEO & Head

www.rathi.com

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Mumbai - 400 013