

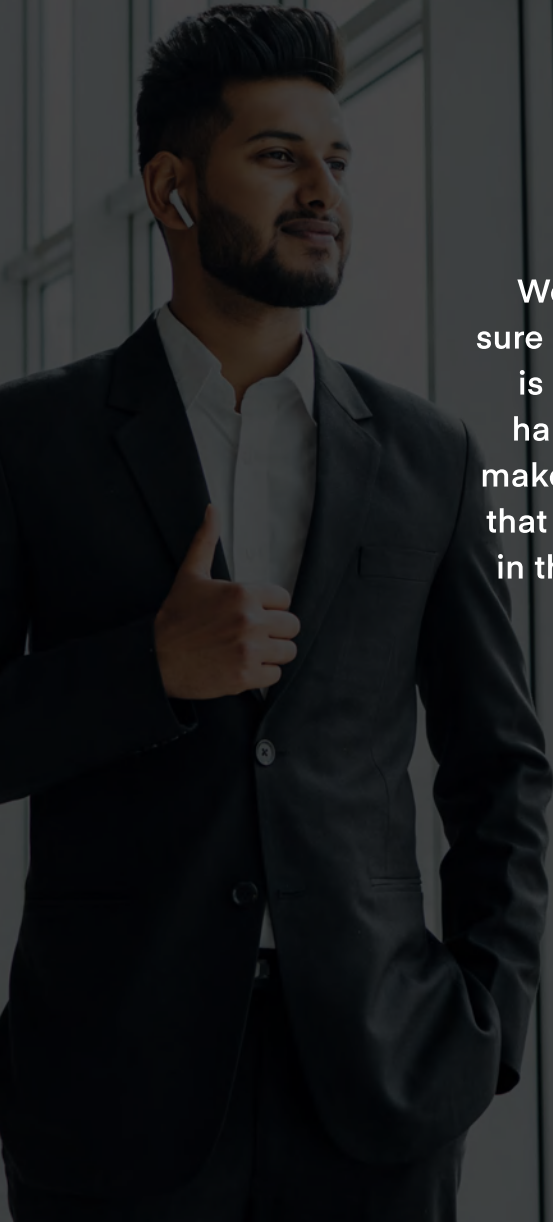
**WHERE  
LEGACY**


**MEETS  
TECHNOLOGY**

**EACH OF US HAVE BIG DREAMS,  
GRAND PLANS AND THINGS WE  
ALL SAY 'ONE DAY' TO.**



We want to make sure that our money is working just as hard as we are, to make those dreams that keep us awake in the day, a reality someday.





Three decades ago, we too set out on a journey with a dream in our eyes. A dream where we envisioned being partners in progress to our investors & friends and fulfil their aspirations of a financially planned and prosperous life.

That dream is a legacy today as we did not just become an integral part of our 70,000+ clients' lives but also learnt, evolved and grew with them, one generation after another. Today, just like our own team, our investor universe is as diverse as it can get.

With clients from every demographic and geographic location in India, you will witness a team that is constantly on the move, to stay with and ahead of the market curve.

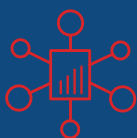
Investments that took you hours until yesterday, are now possible in seconds and right at the tip of your hands, with our new releases and products that are constantly being developed for you and your next generation of investors too!

With the wisdom and experience of the past and a clear mission for the future.

**Welcome to our world where legacy  
meets technology.**

# 70,000+

Clients



## 300+

Channel Partners



## 15,000+

Active Clients



## 30+

Years of  
Managing Wealth



## 50+

Cities across  
India

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# WHY YOU SHOULD INVEST WITH US?

We dive deep into the market to provide you with in-depth research across all our products and services.

With experts in every dimension of the market, we come to you with a collective experience of 100 years.

Our services are moulded for the investor in you, no matter which generation or strata you belong to.



**We hand-hold you across your investment journey to help you achieve your investment goals, every single time.**



## Our Inception

Took our first step to make our way into the Indian Market

# 1989



## Our Stock Market Membership

A decade later, we acquired our own stock exchange card and became members of the National and Bombay Stock Exchange

# 2000



## To New Beginnings

We introduced BSE F&O, NSE Cash & CDSL (Asset Alliance) related services for our clients and customers

# 2005



## And Newer Initiations

As we initiated the NSE F&O Trading Depository Services and NSE & BSE Derivates

# 2008



## Newer Markets

We then ventured into commodities and insurance broking for our coveted clients

# 2017



## Breakthrough Technology

With the introduction of our very own disruptive trading and web platform - **INVESTMART**

# 2019

# INVESTMART (The Trading App)

Single Click Execution  
for all your orders

Light Speed  
Transactions

User Friendly  
Experience

Add & Remove Funds  
Anytime Anywhere

Constant Portfolio  
Tracking Round-the-  
Clock

Access to Back  
Office Reports



Apply for Online IPO

In-Depth Market Data

Stay on Top with  
Price Alerts

After Market Orders

Mutual Funds &  
SIP Transactions

# PRODUCT AND SERVICES



## Equities

Online Trading

Offline Trading/Dealing

In-Depth Market Research

Strong Back Office Support



## Mutual Funds

Goal Planning

Online Purchase &  
Redemption of Funds

Online portal access for  
detailed Investment Reports



## Insurance Broking

Detailed Audit of client's  
existing Insurance Policies

Need-based guidance  
for Insurance Policies

Dedicated Experts for  
claim management

Online App-based support

Personalised login to access your  
complete Insurance Portfolio





## IPOs

Apply for IPO online

Pre-bidding of Upcoming IPOs



## Wealth Management

Comprehensive  
Investment Planning

Best possible Asset Allocation

Active Tracking &  
Management of Portfolio



## PMS Distribution

We strongly believe in  
giving the Best Product  
available in the industry



## Currency Derivatives

Expert Support for your  
Currency Exchange with  
Strong Technical and  
Fundamental research



**OUR  
CORE  
TEAM**



**30+**  
Years of  
Managing  
Wealth



Investment  
Solutions



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