



Our Customers Our Partners

Our core philosophy

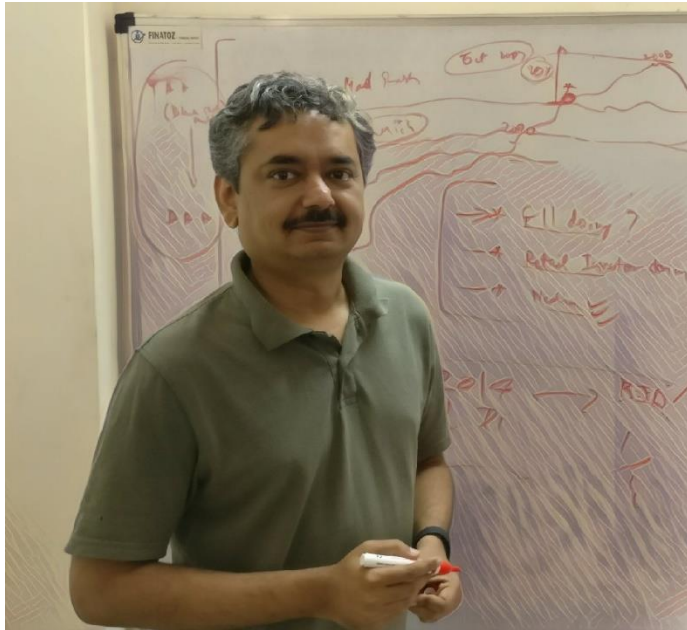
We believe in Goal based, long term Investing approach based on your risk profile

Our structure to serve you better



Team FinAtoZ

Co-Founders



Shrikant Kolhar



Deepak Jain



Shailendra Kumar



Shrikant Singh



Neelkanth Shroff



Abhishek Nigam



Navneet Kumar



Rohini Priyanka



Srividya



Sharon Stephenson



Vardaraj



Mayank Ojha



Suman Mandal

FinAtoZ Planning Platform

Advantages of FinAtoZ Planning Platform

- Real time access to data
- Simplified goal based tracking
- Details of allocation to each goal
- Integrated access for Helpdesk, Action item tracking & Fees payment
- Bank grade security server

Features Roadmap

- Service request support is getting integrated
- Fees payment online
- Better reporting
 - Post tax & post fees returns
 - Fund snapshot
 - Current Asset allocation
- Insurance planner and tracker
- Calendar integration for action items

OPINION POLL – Seh wag vs Dravid

Portfolio Name	Year 1	Year 2	Year 3
Sehwag	48%	45%	-52%
Dravid	42%	22%	-19%

Which portfolio would you choose?

Any idea what would be the final return of these 2 portfolios?

FAMOUS MARKET CRASH

Crowd Buying
FIIs Selling



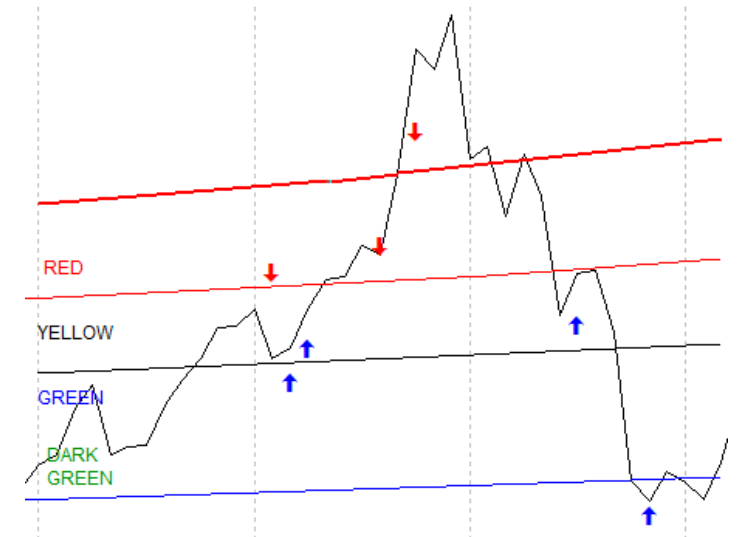
Sehwag vs Dravid.....contd.

Portfolio Name	Year 1	Year 2	Year 3
Sehwag (Sensex)	48%	45%	-52%
Dravid (FTM)	42%	22%	-19%

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Overall
3%
40%

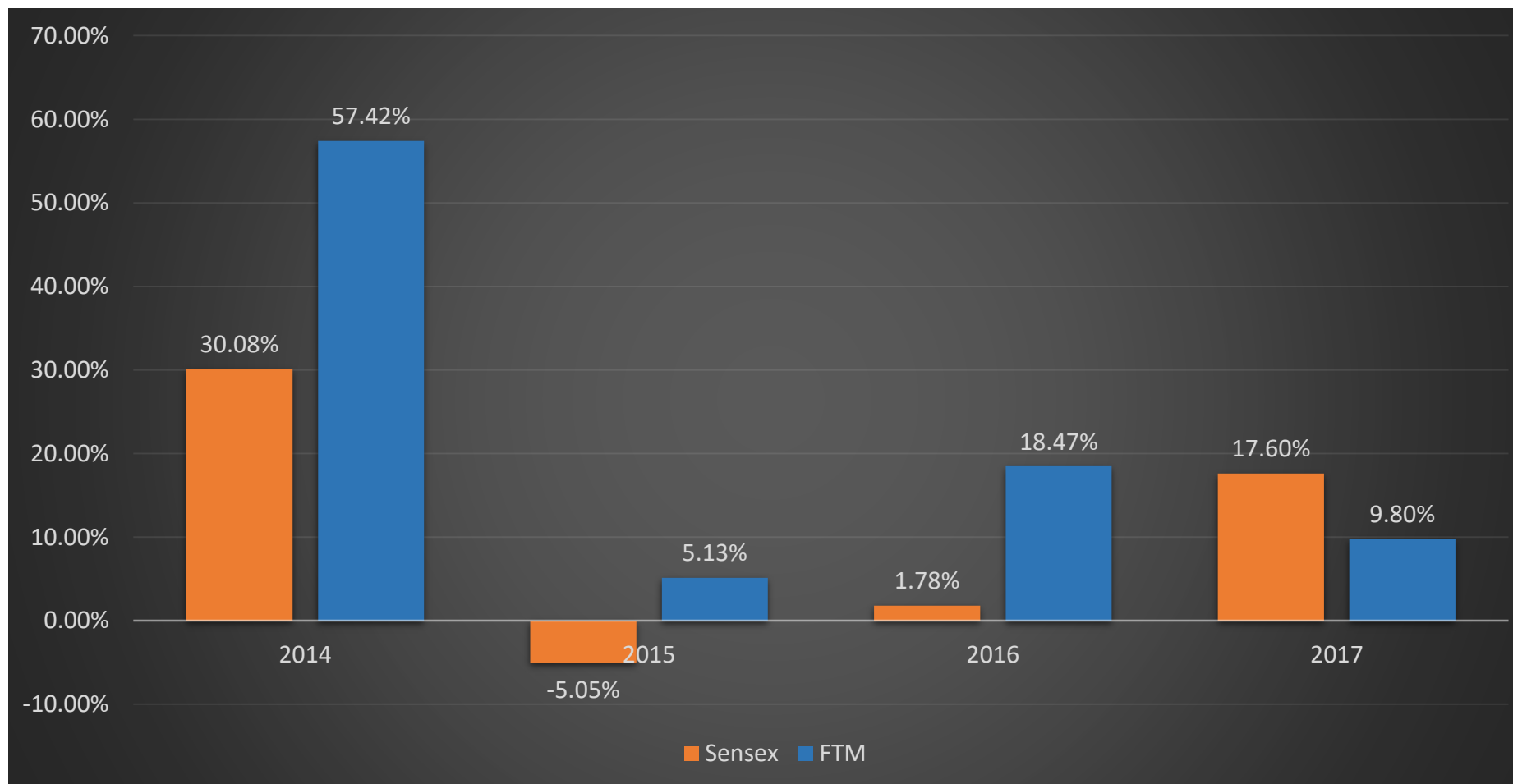
An **explosive** batsman like Sehwag may help you to win a One-Day match but it needs **consistency** of Dravid to win a Test Series



2014 Onwards



Summary of 2014 to 2017



FTM is an advanced investment strategy that **reduces your investment risk significantly** without compromising on your returns!



"Be **Fearful** When Others Are **Greedy**
and
Greedy When Others Are **Fearful**"

Current allocation (June 16th, 2017)

We are currently in **RED** Zone of Equity

Asset	Allocation
Equity	~ 27%
Debt	~ 70%
Gold	~ 3%

3 Possible Scenarios from here

Scenario 1: Markets continues to go up and moves into Dark Red zone

Action: We will watch carefully and book profits if required

DARK RED

Currently we are here



RED

Scenario 2: Markets corrects and moves into Yellow Zone

Action: We will invest more into equity

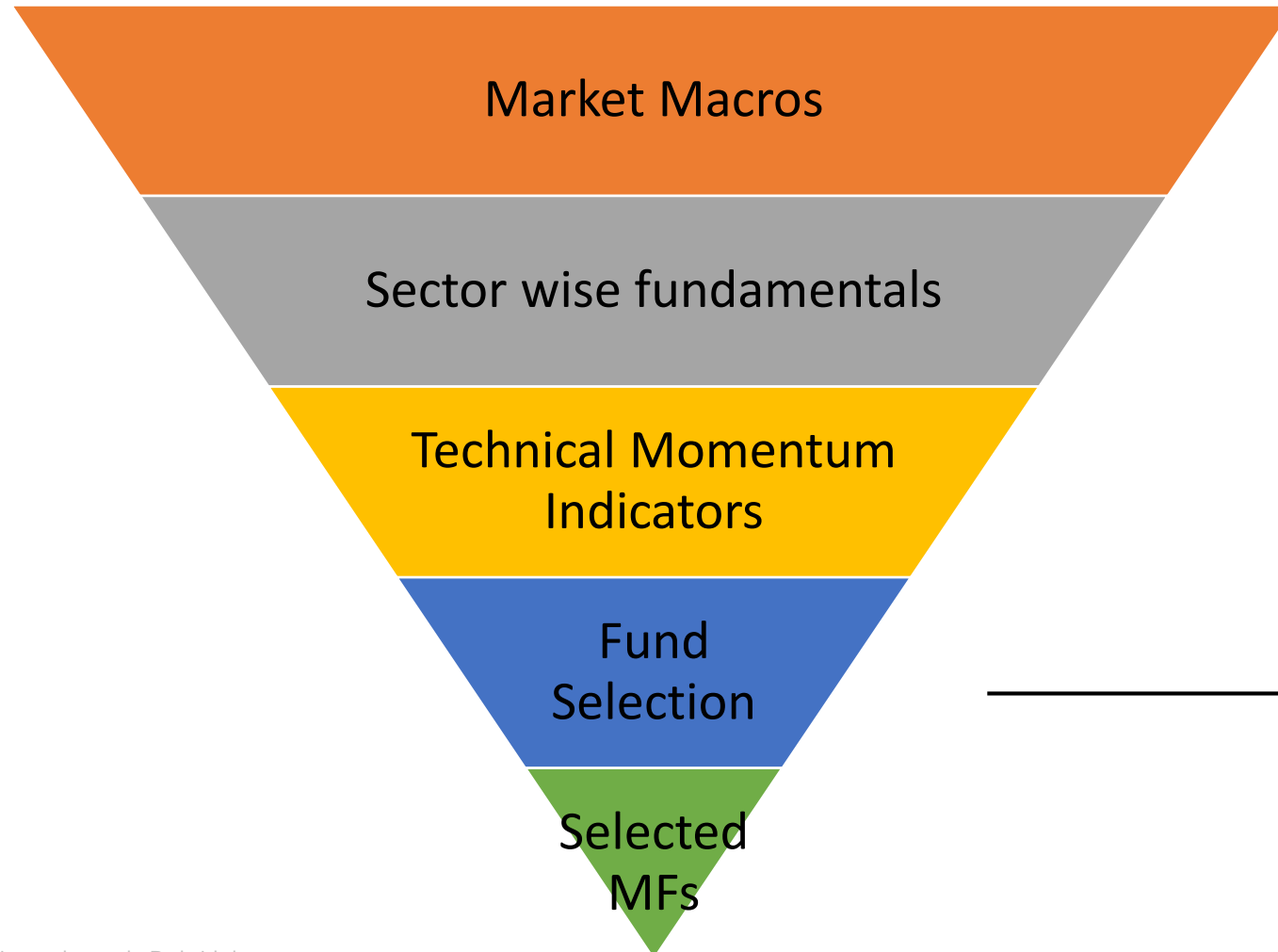
YELLOW

Scenario 3: Markets corrects significantly and moves into Green Zone

Action: We will invest aggressively into equity

GREEN

What we do to keep your Hard Earned Money Safe & Make it Work HARDER than YOU 😊



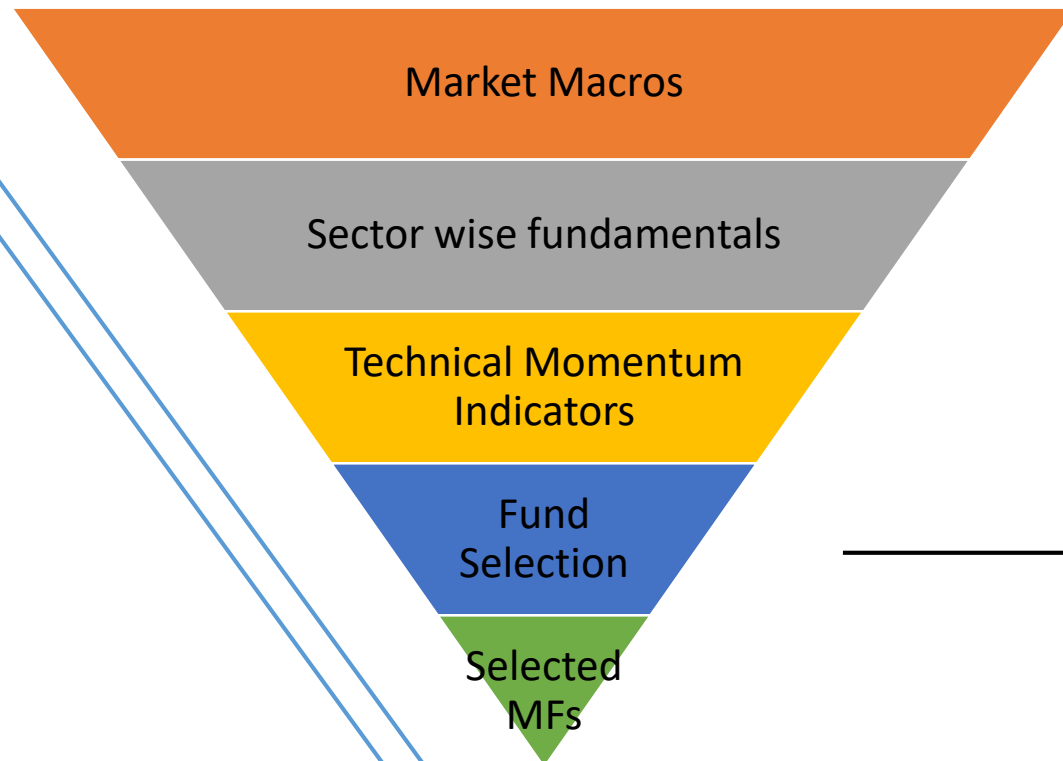
- FTM Model
- Meetings with Best of breed Fund Managers
- Analysis of Research reports

- Morning Star Research Workstation
- Fund Manager Performance
- Fund Performance

What we do to keep your Hard Earned Money Safe & Make it Work HARDER than YOU 😊

Your RISK PROFILE!!

DEFENSIVE



- FTM Model
- Meetings with Best of breed Fund Managers
- Analysis of Research reports

- Morning Star Research Workstation
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GROWTH



Thank You