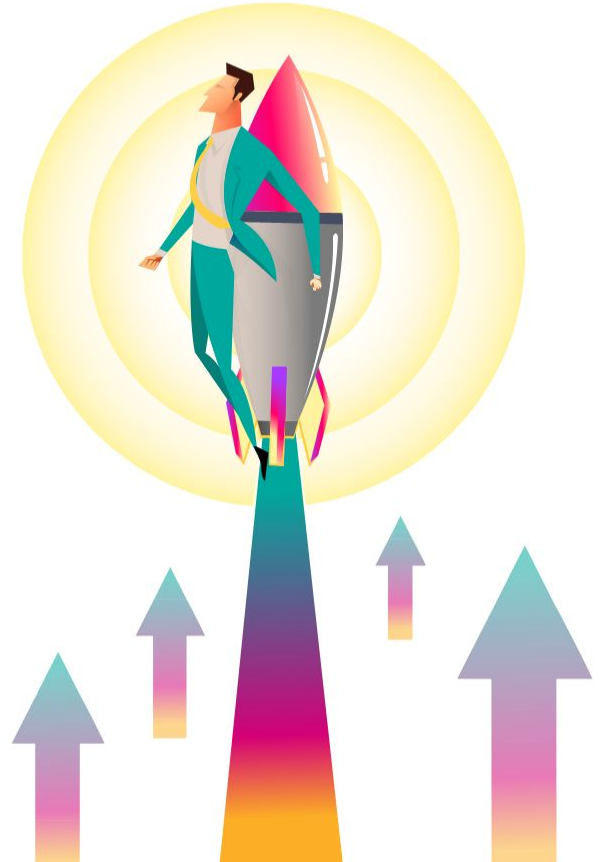


 WealthDesk

WealthBasket Managers - Catalogue



Alpha focused boutique asset manager in long only strategies for Indian equities

See WealthBaskets

RIA

Sunil Singhania
Founder



Rahul Veera
Fund Manager



1 SEBI Registration Number
INA000015729

4 On WealthDesk since
Jul-2021

7 Rebalancing frequency
Discretionary

2 Years of team experience
140+ years

5 Subscription Fees
0.625% quarterly

Research Methods
**Discover, Delve, Develop,
Detail, Delivery**

3 Number of WealthBaskets
02

6 Minimum ticket size
Rs. 5,00,000

**MEETS - Management, Earnings,
Events, Timing, Structure**

 [Email](#)

 [Website](#)

 **Mumbai**

Social Media Handles



Uses dual approach of superior stock selection and tactical positioning

See WealthBaskets

RA



1

SEBI Registration Number
INH000002145

4

On WealthDesk since
Mar-2022

7

Rebalancing frequency
Discretionary

2

Years of team experience
50+ years

5

Subscription Fees
Rs. 2,000 semi-annually

3

Number of WealthBaskets
01

6

Minimum ticket size
Rs. 2,00,000

Research Methods
Follows GIVE framework:
G – Governance
I – Industry Attractiveness
V – Valuation
E – Earnings Quality

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 **Chennai**

Social Media Handles



Investment advisory firm that follows the motto of 'Protect Capital, Create Wealth'

See WealthBaskets

RIA

Rajesh Kothari
Founder



1

SEBI Registration Number
INA000015701

2

Years of team experience
50+ years

3

Number of WealthBaskets
01

4

On WealthDesk since
Oct-2021

5

Subscription Fees
0.625% quarterly

6

Minimum ticket size
Rs. 5,00,000

7

Rebalancing frequency
Discretionary

Research Methods
Focus on digitalisation & growth potential, combines top-down and bottom-up research



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Mumbai

Social Media Handles



A part of William O Neil Pvt. Ltd., that aims to provide individual investors with the knowledge and information they need to achieve success in their investments and in their financial lives.

See WealthBaskets

RIA



1

SEBI Registration Number
INA200005125

4

On WealthDesk since
Jan-2021

7

Rebalancing frequency
Discretionary

2

Years of team experience
100+ years

5

Subscription Fees
**Rs. 1,290 to Rs. 2,990
semi-annually**

3

Number of WealthBaskets
05

6

Minimum ticket size
Rs. 1,999 to ~Rs. 3,50,000

Research Methods

**Uses quantitative model to help
investors find the most accurate
ideas in the stock market**



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[Website](#)



Bangalore

Social Media Handles



Equity focused investment house with an aim of long-term wealth creation

[See WealthBaskets](#)

[RIA](#)

Pankaj Murarka
CIO



Pawan Parakh
Fund Manager



1

SEBI Registration Number
INA000014827

2

Years of team experience
40+ years

3

Number of WealthBaskets
03

4

On WealthDesk since
Apr-2021

5

Subscription Fees
1.25% semi-annually

6

Minimum ticket size
Rs. 1,00,000 to Rs. 2,50,000

7

Rebalancing frequency
Discretionary

Research Methods
Investing into good quality business that can deliver sustainable growth over medium to long term



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Mumbai

Social Media Handles



Investment advisory firm with an aim to build an ecosystem of Trust, Integrity, and High-Performance Standards

[See WealthBaskets](#)

[RIA](#)

Dr. Nirakar Pradhan
Founder, Director



1

SEBI Registration Number
INA000014128

2

Years of team experience
60+ years

3

Number of WealthBaskets
1

4

On WealthDesk since
Nov-2021

5

Subscription Fees
0.5% quarterly

6

Minimum ticket size
Rs. 5,00,000

7

Rebalancing frequency
Discretionary

Research Methods
70% of the stocks are selected via a quantitative model and 30% of stocks are selected through subjective analysis



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Mumbai

Social Media Handles



Investment Advisory firm offering clean and unbiased equity portfolios to help grow wealth

See WealthBaskets

RIA

Ram Kalyan Medury
Founder



1

SEBI Registration Number
INA200015583

4

On WealthDesk since
Oct-2021

7

Rebalancing frequency
Discretionary

2

Years of team experience
50+ years

5

Subscription Fees
0.625% quarterly

3

Number of WealthBaskets
01

6

Minimum ticket size
Rs. 2,50,000

Research Methods
Selecting companies with low debt, consistent efficiency & promoter integrity

Aims to identify growing companies



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Hyderabad

Social Media Handles





LOTUSDEW

Wealth tech company that uses big data to construct portfolios in global equity

See WealthBaskets

RIA

Abhishek Banerjee
Founder, CEO



1

SEBI Registration Number
INA200013770

4

On WealthDesk since
Feb-2022

7

Rebalancing frequency
Discretionary

2

Years of team experience
50+ years

5

Subscription Fees
Rs. 3,500/5,500
quarterly/semi-annually

3

Number of WealthBaskets
02

6

Minimum ticket size
Rs. 25,000 or Rs. 5,00,000

Research Methods
Uses proprietary data and process to extract dominant conviction in the market



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Hyderabad

Social Media Handles



Creates factor-based investment baskets which captures factor premiums on top of size and sector

[See WealthBaskets](#)

[RIA](#)

Sujit Modi
Founder & CEO



1

SEBI Registration Number
INA000013712

2

Years of team experience
30+ years

3

Number of WealthBaskets
10

4

On WealthDesk since
Jul-2020

5

Subscription Fees
0.5% semi annually

6

Minimum ticket size
Rs. 10,000 or Rs. 25,000

7

Rebalancing frequency
Monthly / Quarterly
(basis WealthBasket)

Research Methods
Algo-driven basket formulated
after intensive research of over
2 decades



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Mumbai

Social Media Handles



Aims to provide the highest quality advice and investment options based on cutting-edge and in-depth research

See WealthBaskets

RA

Nishit Shah
Fund Manager



1

SEBI Registration Number
INH000001345

4

On WealthDesk since
Nov-2021

7

Rebalancing frequency
Discretionary

2

Years of team experience
20+ years

5

Subscription Fees
Rs. 14,000 annually

3

Number of WealthBaskets
01

6

Minimum ticket size
Rs. 1,18,000

Research Methods
Cherry-picking 10-15 securities across market cap that fall under the themes of: Tech, China+1, ESG and Special Situations



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Mumbai

Social Media Handles



Fundamental research based stock advisory, also offering tactical view

See WealthBaskets

RIA

Ankur Kapur
Founder &
Chief Advisor



1 SEBI Registration Number
INA100001406

2 Years of team experience
18+ years

3 Number of WealthBaskets
03

4 On WealthDesk since
Mar-2022

5 Subscription Fees
0.125% to 0.625% quarterly

6 Minimum ticket size
Rs. 2,00,000

7 Rebalancing frequency
Discretionary

Research Methods
Focus on metrics such as ROIC,
debt levels, management quality &
expected growth
One basket uses Equity (20-60%
allocation), Debt (safety), REITs &
Gold ETFs

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 New Delhi

Social Media Handles



Curates portfolios built around various themes like growth, low-volatility, and monopolies among others

See WealthBaskets

RIA

Sagar Lele
Founder



Prasanna Bidkar
Investment
Specialist



1

SEBI Registration Number
INA000015747

4

On WealthDesk since
Dec-2021

7

Rebalancing frequency
Discretionary

2

Years of team experience
50+ years

5

Subscription Fees
**0.25% - 0.5% semi-annually
or 0.5% quarterly**

3

Number of WealthBaskets
08

6

Minimum ticket size
Rs. 10,000 to Rs. 2,00,000

Research Methods
**Investment philosophy is
based on 5 key tenets of
Personalisation,
Diversification, Cost, Value &
Management**



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Mumbai

Social Media Handles





SmartBox Advisors
Choice of Smart Investors

 **WealthDesk**

Aims to cater Investors with smart and new age Investment Products

[See WealthBaskets](#)

[RIA](#)



1

SEBI Registration Number
INA000016445

4

On WealthDesk since
Mar-2022

7

Rebalancing frequency
Discretionary

2

Years of team experience
50+ years

5

Subscription Fees
Rs. 2,000 or Rs 10,000 annually

3

Number of WealthBaskets
03

6

Minimum ticket size
Rs. 20,000

Research Methods
Deliver proficiency along with low-risk returns & strategized innovative solutions
Balances old-school business skills & modern disquisition



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Mumbai

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An investment management company that focuses on compounding investors' wealth through high-quality research

See WealthBaskets

RIA

Harini Dedhia
Portfolio Manager



Sheetal Malpani
CIO



1

SEBI Registration Number
INA000013873

4

On WealthDesk since
Mar-2021

7

Rebalancing frequency
Discretionary

2

Years of team experience
65+ years

5

Subscription Fees
0.75% to 1% semi-annually

3

Number of WealthBaskets
06

6

Minimum ticket size
Rs. 25,000 to Rs. 10,00,000

Research Methods
Identify businesses that can earn above average returns on their capital & values their ability to generate long term cash flows



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Mumbai

Investment style: Core & Satellite investing strategies

See WealthBaskets

RA

Sumit Singh
Managing Director



1 SEBI Registration Number
INH100005996

2 Years of team experience
15+ years

3 Number of WealthBaskets
03

4 On WealthDesk since
Mar-2022

5 Subscription Fees
Rs. 6,000/10,000
semi-annually/annually

6 Minimum ticket size
Rs. 33,000 to Rs. 56,000

7 Rebalancing frequency
Discretionary

Research Methods
Core: Identify quality stocks which are going to be major wealth builders in long-term
Satellite: Identify Momentum stocks that are flavor of market, for short-term horizon

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 Ahmedabad

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