

MoneyGuru Finserv

Wealth Management & Investment Banking

AMFI Registered
National Distributors of
MutualFunds

There's more to Wealth with MoneyGuru..



Core Values of MoneyGuru

Our Values

Our Values reflect who we are and what we stand for as a Company

Integrity

We uphold the highest standards of integrity in all of our actions

Quality

We provide quality service and investment products that together deliver premium value to our customers and help in complete financial planning and nurturing their investments to achieve Customer's goals.

Team Work

We work together, across boundaries, to meet the need of the customers and to help company WIN.

Will to Win

We exhibit a strong Will to Win in the market place and in every aspect of our business

Customer Commitment

We develop relationships that make a positive difference in our Customer's lives

Respect for people

We value our People, encourage their development and reward their performance and serve our clients both internal and external with Honesty, Transparency and Right Advice

Personal Accountability

We are personally accountable for delivering on our Commitments and Services

About Us

Moneyguru Finserv is a Financial Advisory services of Mutual Funds registered with AMFI, operational for 10+ Years , managing more than 1200+ clients. **Moneyguru Finserv** offers a wide array of products and services, including integrated Financial planning, Wealth management, Tax Planning, Insurance (Life, General and Health), Equity Broking, Mutualfunds, Corporate and Retail Loans across India.

Moneyguru Finserv serves over 1200+ clients, high net worth families and individuals, retail and Corporate (SME and MSME) investors across India.

Our aim is to provide independent, high quality and customized Services to Individuals. "Maximizing Wealth" is the first and foremost motive of us.

Our services are individually designed to meet clients' needs as determined by personal consultations and constant monitoring of their financial goals.

Our approach is to counsel individual clients, understand their profile, needs and concerns, build customized financial investment portfolios, offer a comprehensive selection of investment alternatives that will suit their Financial goals.

Our Vision

To build **Moneyguru Finserv** as a trusted brand in the Financial Services .

- To grow as the most Reliable and Trusted Brand.
- To Grow as the most Respected Brand in Financial Planning in India.
- To be the most Diversified Brand in providing Investments Options.
- To make a user friendly technology platform with 100% digital transactions for the convenience of clients across India.



Our Mission



To provide a wide range of products and services in the field of Financial Services Segment with a commitment to:

- Highest standards of quality at reasonable cost.
- Meeting the general and sophisticated financial goals of our clients.
- Developing, encouraging and rewarding superior performance of our employees.
- Our Motto is to invest your money in mutual funds carefully and safely like your own investment.



Milestone of Success Stories

Laid the
Foundation
Stone for
MoneyGuru

2011

Commercial
Launch of
Business
Operations
@ Vadodara
(Head
Office)

2012

Launch of
Mutual Fund
Business
Launch of
Ahmedabad
(Branch)

2013

Domestic &
International
Alliances with
Banks,
NBFC's/VC/PE
Firms
Launch of
Equity
Broking
Business

2014

Developed
network of
Business
Partners in
West Zone

2015

Developed
network of
Business
Partners in
Northern India
Covering 8+
Sectors

2016

To be contd...

Milestone of Success Stories



Core Management Team



Mukesh Jagwani

(Founder &
Managing Partner)

- 25 years of experience in corporate world with rich experience in Life Insurance, Broking, Office, Automation, Telecom and Media House.
- Founder Partner & Director of MFAS, industry expert on Fund Raising (through Debt & Equity), SME IPO Consulting, Valuations and Credit Rating Consulting.
- Well developed client relationship, interpersonal and leadership skills that permit easy and effective team work with multiple constituencies globally

Key Focus area :-

- Fund Raising for clients in India, UAE, Middle East, Africa & Asian Continent
- Sub Advisor Recruitments for mutual funds Pan India Basis to strengthen the distribution channel network and presence across India
- Setting up Marketing Strategies and Digital Marketing plans
- Co-ordination for tie-ups, strategic alliance, JV & Business/Branch Partnership

Core Management Team



Naresh Asnani

(Co-founder &
Managing Partner)

- 25 years of experience in corporate world and also is Founder Director of VN Info Services Pvt Ltd for over a decade at Vadodara. He laid the strong foundation, is young and dynamic, managing sales force team, back office team and operations and managed Equity and Debt Funding (Secured and unsecured business loan) business vertical @ MFAS
- Experience in business distribution of Telecom, Equity Broking, Financial Markets, Life – General & Health Insurance.
- Deep rooted relationships with Senior Management spread across the functions, covering the entire spectrum of financial service sector including financial institutions and Banks (PSU, Private Banks and NBFC's), Life & General Insurance Companies

Key Focus area :-

- Equity Broking
- Life, General & Health Insurance
- Team Management and Recruitments
- Debt Funding (Secured & Unsecured Business Loans)
- Branch Budgeting and Costing

MENTORS & ADVISORS ON BOARD



Mr. Vikas Khosla

A well rounded Power Sector professional with over 43 years of experience having industry-wide networks in India & abroad and currently consultant ' Business Transformation & Marketing Strategies' as well as Director in 2 companies.

Held leadership positions in Aditya Birla Group (2013 -17) and was President - Insulator Business and later, President - Corporate Affairs & Business Development (Chemical &

Insulator Business) . As an Ex -Chairman - Public Policy cell of 50 Bn \$ Industry body IEEMA (2016-18), played an active role in influencing Govt of India's policy on RCEPS & FTAs protecting domestic industry's interest.

Was the first in India in the power sector domain to bring trade remedial measures against China in the Insulator segment. Was Industry nominated member of Govt of India's Inter ministerial Group (IMG with nodal agency, Ministry of Heavy Industries) on Industry Competitiveness, Exports & Conversion of Latent Demand for the year 2017-18. Earlier also, was a nominated member by IEEMA on MoP's task force on "Make in India" campaign during 2014 -15

Was also 5 times IEEMA's Executive Council Member

A recipient of rare appreciation from Mr Kumar Mangalam Birla, Chairman of Aditya Birla Group for Insulator business turn-around and contribution to domestic industry.



Mr. Shaurin Shah
International Business
Development Strategist

25 Years of experience, Widely Travelled to more than 50 countries. Last 16 years associated with CMC Machinery LLC as an Associate Vice President-Business Development New Jersey USA . Involved with large corporates on Capex investment in Pharmaceutical Plant , Machinery & Projects. Guiding various Corporates TOP Management to use tools to boost

productivity. Promote GLOBALLY MAKE IN INDIA INITIATIVE TO ABUNDANT INDIA SKILLS In various sectors.

MENTORS & ADVISORS ON BOARD



Mr. Uday Singh
Mentoring & Advisory

Uday brings over two decades of experience within Human Resources includes (industry & consulting) having diverse sectoral experience with; Manufacturing, Steel, FMCG, IT-SAP & Retail. He is involved with Startups & SME's in areas of Organisation Development, Leadership & Management consulting, People Processes & Automation. Presently into Management Advisory & HR Shared Services.



Col. NP Singh
Global Director (Business
Development & Strategic Alliances)

Col. NP Singh is a Paratrooper and Retired Col. from the Indian Armed Forces, a Post Graduate in Computer Science (Indian Institute of Technology, Mumbai) and a Chartered Engineer. Col. Singh has administered, managed and engineered large scale communication, Construction/Infrastructure Projects for the Government.

Post retirement in 2006, Col. NP Singh has held various leadership roles in Infrastructure, Real Estate and Technology Companies across India, US, Israel, where he has been involved in forging Joint Ventures, Investment Banking, Project Funding and Government liaison. Col. NP Singh brings in astute understanding of various industries and has been on advisory roles for fundraising, board development, leadership transition, succession and organizational effectiveness.

Col. NP Singh is currently holding the following Portfolios :-

Director – Business Development, Global from UK, ASEAN and SE Asia based offshore Fund with Debt Syndication in 35 countries including US

Director – Global Business of Paris based NPO associated to bring FDI's globally

Director – Global Business for Indo Latin American Chamber of Commerce, India incident on Latin American Countries for Bilateral trades.


Segment & Services

The Core Management Team behind MoneyGuru Finserv has tremendous track record of success, domain expertise across financial services and vertical and collaborative working partnership

General Finance	Investments	Structured Transactions
Personal Loans	Mutual Funds	Debt Funding
Credit Cards	PMS	Equity Funding
Mortgage Loans	IPO's	ARC Co-ordination
Small Business Loans	NCD's	Commercials Real Estate
Unsecured Loans	Fixed Deposits	Company Valuations
Secured Loans	Bonds	Credit Ratings
OD/CC/LAP	Equities	M&A
Working Capital Loans	Commodities	Jv's & Alliances
Term Loans		Project Finance
		SME IPO Consulting



About Us

 Clients across
India & Abroad

 1350+ satisfied clients

 Head Office at Gujarat
(The Investment hub of india)

 160+ SME/MSME clients (across India)

 Operational since Year 2011 (10 Yrs)

Our Philosophy

Integrated and open architecture approach to investing and financial planning

Align client's interests and our interests for mutual growth

Create portfolios to generate better risk adjusted returns

Trust, openness, transparency and confidentiality

Our Approach



We understand your risk taking capabilities and ensure that we have a proper mix of investment in different asset classes

Risk Assessment

Create unique portfolios

We follow intense process to deliver the best quality research to create "Bespoke Portfolio" that define life goals and risk appetite.

We ensure you have the right mix of asset classes so you get optimum returns with reduced risk.

Identify an ideal Asset Allocation

Report & Review

With the use of Technology and Human Touch we make reports and Review easy process and at your finger tips.



BROAD RESEARCH



HONEST & TRANSPARENT APPROACH



OPEN ARCHITECTURE



LATEST & MODIFIED TECHNOLOGY SUPPORT



QUALIFIED & EXPERIENCED TEAM



RESEARCH & RISK APPETITE BASED PORTFOLIOS FOR CUSTOMERS

Life Long Learning



Life Long Earning



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Wealth Management & Investment Banking



For More Details / Information,
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Outreach in following Countries

India | Singapore | UAE | Middle East
UK | Gulf | Africa | USA