



**AIF & PMS**  
EXPERTS INDIA  
ASK THE EXPERT

# **AIF & PMSExperts India Pvt. Ltd.**

- » **Most Trusted Digital Platform for AIF & PMS**
- » **Most Knowledgeable Team**
- » **Fully Process Driven**
- » **Experts in AIF & PMS**

**THANK YOU**

**6000+**

**Registered Users**

# About AIF & PMS Experts India

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## Company Profile

AIF & PMS Experts India Pvt. Ltd. was established on 1st May, 2020. It is a Digital Platform to serve the investors with top class portfolio managers. As the name indicates, we specialize in alternate investments and portfolio management services. The conduct of operations has sailed

its one year with more than 5000 subscribers availing benefits from our organization.

Very soon, the little start-up managed to grow and recently it has been awarded as “Indian Achievers Award” by “Indian Achievers Forum” for being the appealing start-up in the prevailing segment.

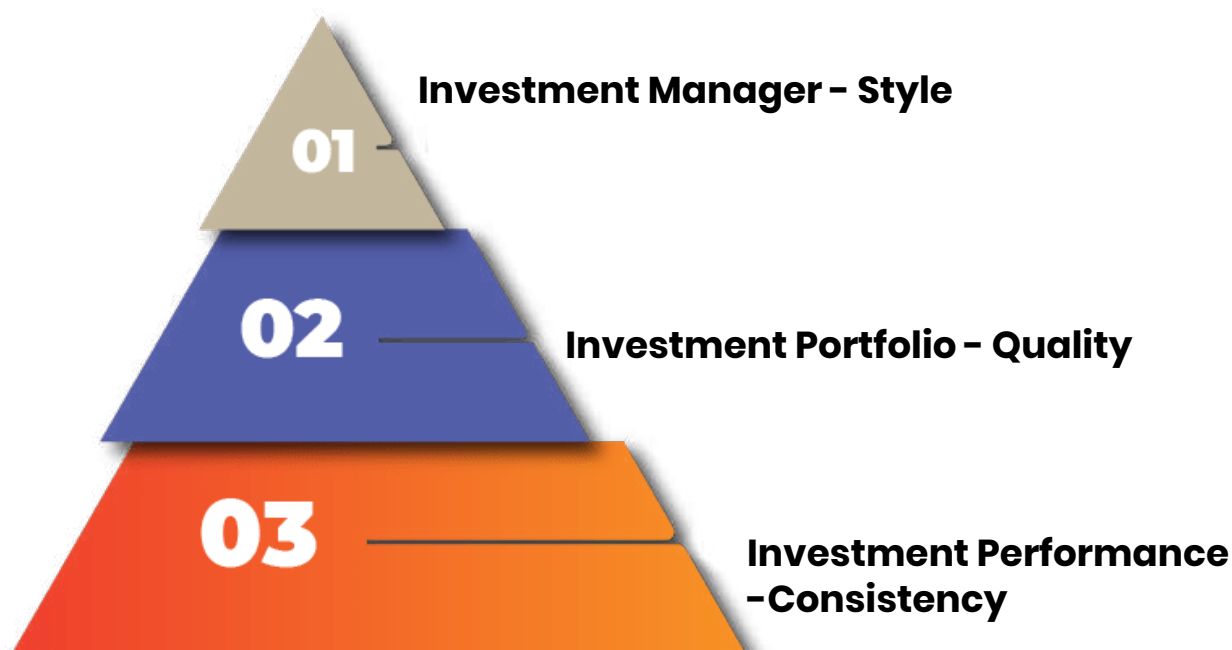
At AIF & PMS Experts, a Digital Platform has been created and it follows the 3I framework to strategies investments. Our unique 3I investment framework helps us monitor quality and compartmentalize processes. With more than two decades of collective repute in PMS management, we have built this dream of taking our “L-E-A-P” of Wealth. **“L-E-A-P” of Wealth.**

- L = Learning from top managers**
- E = Encompassing our strategies around the long-term risk-reward matrix**
- A = Actively Analysing the active fund management strategies and**
- P = Presenting ideas through our unique Manager-Centric Approach to Investing.**

# The 3I Framework

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Here's what our 3I approach includes:



**Investment Manager – Style :** We devote our 60–70% of time to comprehend the style of the fund manager. In order to align the risk appetite of the investor with the expectation, we do our research to look after their investing pattern.

**Investment Portfolio – Quality :** We examine the ROE and ROCE to gain better out-turn by doing a queued analysis of the company since inception. This gives an idea that whether the fund manager is working on the on the probability or running the strategy with high conviction ideas.

**Investment Performance – Consistency :** The third ‘I’ focuses on how much risk adjusted returns has been delivered to the investors. It counts for major attention as investors does not like the peaks and valleys of the prices.

## What Makes us Unique



# Why Choose us

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## Experienced and Trusted Legacy



Since our inception, we have focused heavily on building trust with our customers. Our Management stands by this two-decade-old legacy of being transparent and enabling growth-oriented wealth management leadership. We have become one of the most esteemed investment portals for the HNIs and the Ultra HNIs through our expertise and experience in this industry

## Take a LEAP of Wealth through our Fund Manager-Centric approach

As a brand, we undertake “**L-E-A-P**” of Wealth.

Where “**L**” represents our Learning from top managers, “**E**” stands for Encompassing our strategies around the long-term risk-reward matrix, “**A**” means Actively analyzing the active fund management strategies, and “**P**” is Presenting ideas through our unique Manager-Centric Approach to Investing.



## Sophistication Embedded in Simplicity



Our approach to implementing investing strategies is unique and simple. You can compare portfolios through our best-in-class technology vetted by market experts. Our top-notch tools and calculators are exceptionally built to provide niche investing experience for the HNI and the Ultra-HNI.

# Our Team

## Key People

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### **Vikas Agrawal | Founder & CEO**

Mr. Vikas Agrawal, MD & CEO of AIF & PMS Experts has been gaining the proficiency in the field of wealth Management from last 16+ years. He was formerly the senior Vice President at Motilal Oswal. He have been introduced with the opportunity to attend the AGM of Berkshire Hathaway back in 2016 witnessing the two legends, Warren Buffett and Charlie Munger speak.



### **Shashi Agarwal | Director and Chief Technology Officer**

Mrs Shashi Agarwal has an MCA degree. She has worked with companies like Aptech in the past. Her strong foothold over technology makes Shashi one of the most critical team members in building platforms and ideating Application Programming Interface(APIs). Her foresight and ideation in technology have helped AIF & PMS complete its initial internal technical projects.

Conventional in her approach, yet humble in her thoughts, Shashi adds experience and spirit to the technical team at AIF & PMS Experts. A significant part of her experience is in building technology for the BFSI segment

### **Mrityunjay Prasad | Chief Marketing Officer**

Mr Prasad infuses life to our brand with more than 16 years of experience in digital finance branding. Previously, Mr Prasad has worked with Narnolia Financial Advisors Limited as Senior Manager- Branding. His experience lies majorly in the BFSI segment. He believes that decision simplicity, reputation management and active promotion plays a vital role in driving business in the financial domain. He's also a 'pro' when it comes to strategic planning and growth management.



### **Shweta Dhotre | Relationship Manager**

Shweta is an excellent communicator and presenter. She represents a true millennial by demonstrating patience and observance regarding client management. Shweta has a total work experience of around four years and is growing with our growing organisation, at every step.

# Our Team

## Key People

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### **Devanshu Bindlish** | Relationship Manager

Devanshu is a Commerce graduate and has adequate financial knowledge to manage client relations in the financial sector. His passion for finance gives an edge to his tasks. He has around six years of business development experience and has a niche record of building reputation amongst clients



### **Davendra Bardia** | Manager – Client Servicing

Davendra is a highly meticulous person. He is good with finance and communication. The combination of diverse skills makes him a genius at client servicing. Davendra has completed his post-graduation from commerce at the University of Pune.

### **Aadinath Sathe** | Senior Executive – Operations

Aadinath is a commerce graduate. He has immense knowledge about operations in the investment industry. Aadinath has more than 5 years of experience in the financial domain. His judgements and presentations contribute immensely towards projects completion



### **Himanshi Agrawal** | Senior Executives – Social Media

Himanshi Agrawal is highly enthusiastic, motivated and helpful in nature. She is our Sr. Executives – Social Media dept. She has an excellent academic record which has embedded more quality in her. She is extremely passionate about her work because she loves what she does.

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