



AIF & PMS
EXPERTS INDIA
ASK THE EXPERT

www.aifpms.com

AIF& PMS Experts India Pvt. Ltd.

- » One of the Largest
Phygital Platform For
Alternative Investment
&
Portfolio Management Services
- » Experts in AIF & PMS
- » Team of Domain Expert
- » Fully Process Driven

THANK YOU

10000+

Registered Users

About AIF & PMS Experts India

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

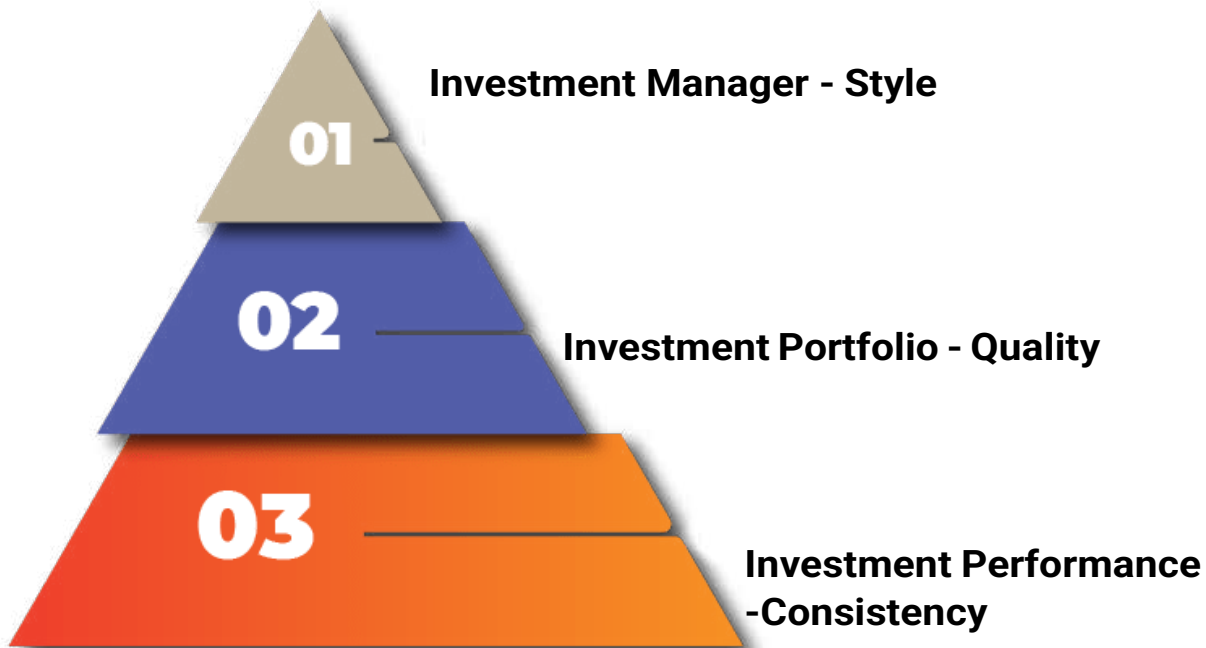
It's one year with more than 5000 subscribers availing benefits from our organization.

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.**

The 3I Framework

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**



Comparison

We collect Performance data from all the respective fund houses and compare them to fetch out the best investments across all the categories.



Unbiased Approach

We follow unbiased approach while constructing the client's portfolio and the allocation goes to the deserving portfolio managers.



Selection

We work on a 'Manager- Centric Approach' and make sure that the style of the portfolio manager matches the requirement of our investors.



Execution

We believe that every action that is taken for some benefit should be executed in no time. To ensure this, help our investors set up online PMS account.



Recommendation

Appropriate suggestions are given based on the risk appetite of the investors to allow them invest in high performing portfolio strategy.



Monitoring

Periodic review is done to check the performance of the strategy. A regular monitoring is done to keep everything in order.

Reasons for Choosing Our Experts



Decision-Making Ability

Our advisers can assist you in developing budgets so that you are prepared to meet your financial objectives with a return.



We Know the Inherent Risk

We investigate several investment choices and ensure that your investment portfolio remains within your intended level of risk.



Analytical Investing Solutions

We provide a prudent, long-term investing solution that is supported by analytics and content.



Optimum Goal Setting

Ensure that you end up with the finest investment planning and solutions for you according to your goals.

Our USP



Domain Experts For AIF & PMS



Paperless On Boarding.



Personalize Portfolio



Analysis Of Risk Appetite



Suitable Alternative Investment Solution.

Why Choose us

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**

Vikas Agrawal | **Founder & CEO**

Mr. Vikas Agrawal is a Founder and CEO of AIF & PMS Experts India, He is a MBA graduate with specialisation in finance. He has also persued the various investment courses from Flame University Pune. With over two decades of expertise in the Asset & Wealth Management Industry, he has established himself as an iconic figure for all of his financial educational programmes for HNI investors in India. He transmitted his alternate investment expertise via podcasts, YouTube videos, informative blogs, and so on displayed at www.aifpms.com. He has interviewed the best 100 brains for equities in India and shared their wisdoms with all the client members of AIF & PMS Experts India. His "Ask The Expert" show is particularly designed to provide expert opinions, information, and forecasts to the public as a way to keep them up-to-date in the best manner possible. He is one of the guest speaker at Zee Business in order to raise awareness about AIF & PMS industry and empower our country's overall wealth.



AIF & PMS Experts India was founded with the single goal of helping investors to participate in capital markets through AIF & PMS and enhance there overall experience and portfolio performance.

Shashi Agrawal | **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



Our Team **Key** **People**

Romit Barat | **Group Mentor**

Romit Barat is a product professional having core competency in the areas of Portfolio Management Services, Mutual Funds, Structured Products, Investment Advisory, Wealth Management, Private Banking, Financial Planning and Insurance. Romit has earlier worked with blue-chip organisations like Kotak, ICICI Prudential AMC, Motilal Oswal and others in various leadership roles. Romit is also a voracious reader and his flair for writing is deep rooted in his noteworthy insight on market behaviors that otherwise go unnoticed.



Roop S Chanchalani | **Chief Financial Officer**

Roop S Chanchalani working as a Chief Financial Officer bringing 37 years of experience with MNC company. He worked with different departments like Customer service cell, Logistics, Exports, and Accounts & Finance. He sees risks and opportunities behind financial data and acts as a strategic business partner for the CEO. And he as an expert on current financial topics related to our industry.



Devanshu Bindlish | **Associate Vice President**

Devanshu is one of the most recent persons to join AIF & PMS Experts. He 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.



Our Team **Key** **People**



Davendra Bardia | **Operations Head - 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.

Helina Xalaxo | **Chief Relationship Manager**

Helina Xalaxo works as a Customer Relationship manager and he comes with 4 years of experience. Responsible for handling and maintaining trusting relationship with our valuable clients.



Himanshi | **Senior Executive – Social Media**

Himanshi Agrawal is highly enthusiastic, motivated and helpful in nature. She is our Sr. Executive-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.

Our Team **Key** **People**

Jaydeep Walke | **Digital Marketing Team**

Jaydeep Walke is Digital Marketing Manager at AIF PMS Experts he is responsible for Planning and Managing all marketing campaigns and activities which helps us to reach to the clients and also make clients to reach us easily. He has done fantastic quality work which added more value to our organization.



Smit Gandhi | **Client Onboarding Head**

Smit Gandhi is a part of management and he welcomes the new client to our AIF and PMS family and ensures they understood about services and solve all queries related to us.

Chirag | **Sales Trainee**

Chirag is a Sales Intern and pursuing BBA in International Business from MIT WPU, Pune and, He is Assisting Sales Manager with his 2 years of work experience and helping our organisation in its mission and vision.



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