



**Wealthoo**



**WEALTHOO FINTECH PVT LTD - PROVIDING PLATFORM FOR FINANCIAL PRODUCTS DISTRIBUTOR IN ALL INDIA**



**NATIONAL DISTRIBUTER**



**HAPPY INVESTORES**



**20 + YEARS MARKET EXPERIENCE TEAM**



# WEALTHOO - FINANCIAL PRODUCTS



MUTUAL FUNDS



ASSET MANAGEMENT



EQUITY & ETF



LOAN AGAINST MF



BONDS & FD



NPS



PMS

# MUTUAL FUND BUSINESS

A mutual fund is a collective investment vehicle that collects & pools money from a number of investors and invests the same in equities, bonds, government securities, money market instruments.



In short, mutual fund is a collective pool of money contributed by several investors and managed by a professional Fund Manager.

# ADVANTAGES OF MUTUAL FUND

Simple to Invest

Professionally Managed

Offers Liquidity

Offers Diversification

Conveniently Administered

**ADVANTAGE  
OF MUTUAL  
FUND**

Gives Higher Returns

Provides Transparency

Highly Regulated

Secure

Tax Benefits

**THINK INVESTMENT - THINK WEALTHOO**



## TYPE OF MUTUAL FUNDS

### Debt Funds

- Invest in short and long term debt instruments.
- Aim to provide regular income.

### Equity Funds

- Invest in equity securities.
- Aim to provide growth and capital appreciation over long term.

### Hybrid Funds

- Invest in a combination of equity and debt securities.
- Proportion of equity and debt may vary.
- Aim to provide for both income and capital appreciation.

**THINK INVESTMENT - THINK WEALTHOO**

**“Do not save what is left after spending, but spend what is left after saving.”**

**- Warren Buffett**

**“In the short run, the market is a voting machine. But in the long run, it is a weighing machine.”**

**- Benjamin Graham**

**You can invest small sums at much higher rates of return than you can large sums.**

**- Warren Buffett**

**THINK INVESTMENT - THINK WEALTHOO**

# Power of SIP

Years	Amount	8%	12%	15%	20%
1 Years	1,20,000	1,29,600	1,34,400	1,38,000	1,44,000
5 Years	6,00,000	7,34,769	8,16,697	8,85,754	10,71,590
10 Years	12,00,000	18,29,460	23,00,387	27,52,171	37,38,050
20 Years	24,00,000	58,90,204	98,92,554	1,49,72,395	2,68,83,072
30 Years	36,00,000	1,49,03,594	3,49,49,641	6,92,32,796	17,01,90,946

Assumed: SIP Amount 10, 000 (Monthly)

## POWER OF SIP - POWER OF COMPOUNDING



## Cost of Delay -1

Particulars	RAM	SHYAM
SIP Starts @ age	25	45
Monthly SIP of Rs.	5000	5000
Returns p.a. (Assumed)	15%	15%
Investment till the age of	60	60
Investment grows for years	35	15
Total Investment (Rs.)	21,00,000	9,00,000
Accumulated amount @ age 60	7,43,03,225	33,84,315
Assumed: rate of return is 15%, for illustrative purpose only		

**Cost of delay for Shyam is over 7 Cr (SIP delayed by 20 years)**

**THINK INVESTMENT - THINK WEALTHOO**

## Cost of Delay- 2

Particulars	RAM	SHYAM
SIP Starts @ age	25	45
Monthly SIP of Rs.	5,000	11,700
Returns p.a. (Assumed)	15%	15%
Investment till the age of	60	60
Investment grows for years	35	15
Total Investment (Rs.)	21,00,000	21,06,000
Accumulated amount @ age 60	7,43,03,225	79,19,228
Assumed: rate of return is 15%, for illustrative purpose only		

**Cost of delay for Shyam is around 6.6 Crores (SIP delayed by 20 years)**

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## MUTUAL FUND OFFERS



**WEALTH BUILDING  
ASSESSMENT**



**REGULAR INCOME  
ASSESSMENT**



**SHORT, MEDIUM & LONG TERM  
INVESTMENT ASSESSMENT**



**TAX SAVING  
ASSESSMENT**



**RETIREMENT  
ASSESSMENT**



**FINANCIAL NEEDS  
ACHIEVEMENT ASSESSMENT**

**THINK INVESTMENT - THINK WEALTHOO**





After-sales Service

**SUPPORT**

**Best Customer support by our Experts**

**Real time investment tracking**

**Update best investment plan to our valuable customer**

**Customized service as per customer Requirement**

**Complete digital platform and digital process**

**Please download our Application**



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