



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





# **WEALTHOO - FINANCIAL PRODUCTS**













**ASSET MANAGEMENT** 









**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.



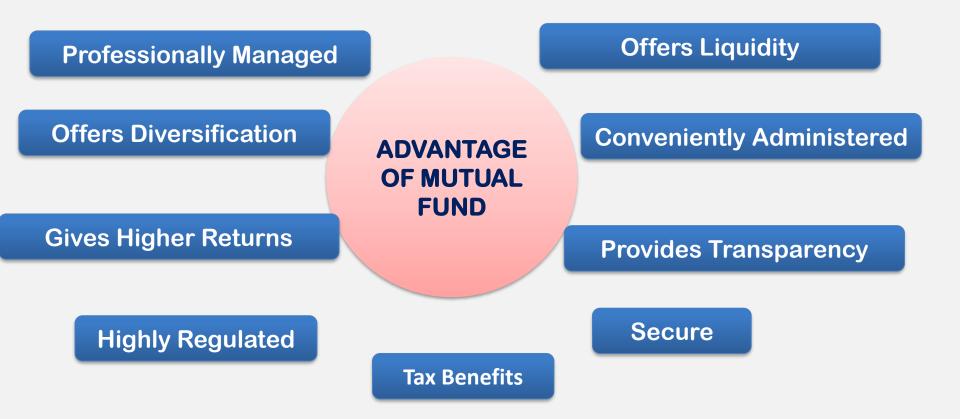
In short, mutual fund is a collective pool of money contributed by several investors and managed by a professional Fund Manager.



# **ADVANTAGES OF MUTUAL FUND**



#### Simple to Invest





### **TYPE OF MUTUAL FUNDS**



Debt Funds	<ul><li>Invest in short and long term debt instruments.</li><li>Aim to provide regular income.</li></ul>

Equity Funds	<ul> <li>Invest in equity securities.</li> <li>Aim to provide growth and capital appreciation over long term.</li> </ul>
--------------	--

Hybrid Funds	<ul> <li>Invest in a combination of equity and debt securities.</li> <li>Proportion of equity and debt may vary.</li> <li>Aim to provide for both income and capital</li> </ul>
	appreciation.





"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



## **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**







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		

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







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		

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



#### **MUTUAL FUND OFFERS**





WEALTH BUILDING ASSESSMENT





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







TAX SAVING ASSESSMENT

RETIREMENT ASSESSMENT FINANCIAL NEEDS ACHIEVEMENT ASSESSMENT







# 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** 



https://play.google.com/store/apps/ details?id=com.iw.wealthoo



https://apps.apple.com/in/a pp/wealthoo/id1660203520

