

WEALTHY NIVESH 
TRUST. SIMPLICITY. GROWTH



निवेश मिलान
2025

Wealthy Nivesh:

A Journey of Growth & Success



Ankit Garg

(Chief Executive Officer - Wealthy Nivesh)

“We started with three people in November, 2022, Myself, Shrishti & Aditya. Then in 2023, we grew to a team of 10 people. In 2024, we were a team of 12 and currently we are a team of 21 people.”

“We have expanded beyond Mutual Funds, PMS, and AIF to include Pre-IPO unlisted stocks, Startup Investments, Corporate FDs, Bonds, NCDs, and Structured Products.”



India's Growth Story:

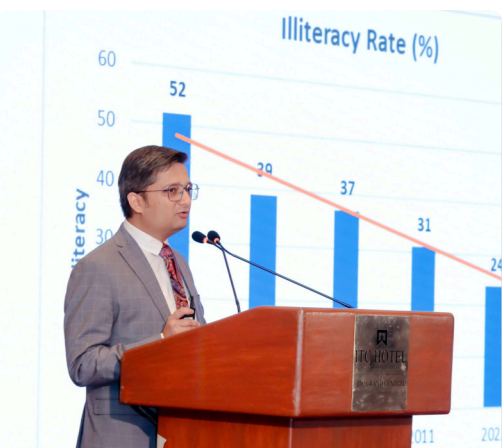
Challenges, Reforms & Opportunities



Ankit Garg

(Chief Executive Officer - Wealthy Nivesh)

"Our rank in Global GDP is going down. We were 13th in GDP ranking globally in 1990. In 2012, we were at 10th rank. It took us 22 years to jump 3 ranks and in the next 5 years, we jumped from 10th rank to 5th rank. Right now, we are at 5th rank and in next 5 years, we will be in top 3"



Glimpses from Panel Discussions

Decoding Budget 2025:

India's Growth Story for the next 5 years



Trideep Bhattacharya
(Chief Investment Officer - Edelweiss MF)

“The moment dollar will stabilise, FIIs will start to come back to the Indian markets.”



Glimpses from Panel Discussions

India Valuations:

Sectors and Market Caps



Vinay Sharma

(Fund Manager - Nippon India MF)

Anand Sharma

(Sr. Fund Manager - ICICI Pru MF)

“Valuation is a complex subject, many make mistakes even after years of experience.”

“The beauty of India is that there are multiple sectors and many stocks so there always is an opportunity available.”



Glimpses from Speeches

Succession Planning vs Nomination: Complexities & Solutions



Jugal Popat
(Co-Founder - Will Jini)

“A myth that people have is- I have added nominees on all my assets. So why do I need a will?”



Glimpses from Panel Discussions

Quant Strategies:

Challenging Traditional Investment Strategies



Sharwan Goyal

(Head - Passive & Quant - UTI MF)

Sailesh Jain

(Senior Fund Manager - Tata MF)

“Momentum strategy underperforms in difficult periods but does well in the long run.”

“Arbitrage funds make are ideal since the price risk is none and the returns are taxed as for equity slabs”



Glimpses from Panel Discussions

Exploring Alternate Investments:

PMS, AIFs and Gift City



Brijesh Ved

(EVP & Head of PMS - Kotak Alternates)

“The vehicle like MF/ PMS/ AIFs is not of prime importance, rather the strategy and investment philosophy is paramount.”

Bheesham Rathi

(Head, Sales - ABSL Alternates)

“Capital cannot be supplied only by equity. Private debt has to play a major role.”

Glimpses from Speeches

Budget changes in Taxation:

How does it affect you?



CA Shubham Patel

(Managing Partner - CSPA & Associates)

“New tax regime has given a relaxation of about 1 lac crs. in taxes for the public.”



Glimpses from Speeches

Mid & Small Caps:

Opportunities and Risks



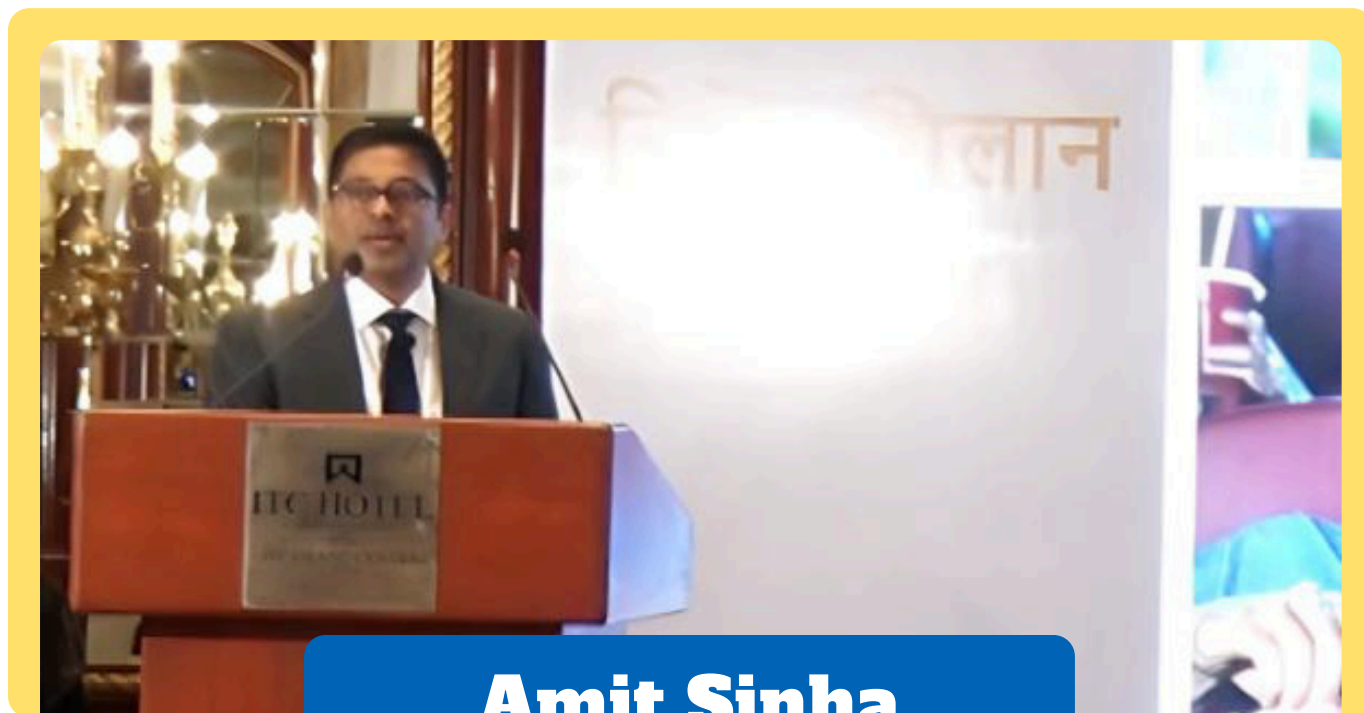
Ankit Jain
(Fund Manager - Mirae MF)

“Mid cap and small cap are an exciting segment of the market. The mid cap has grown from 22L crs. to 88L crs. from Dec’ 2019 to Dec’ 2024.”



Glimpses from Speeches

India's Consumption Story



Amit Sinha

(Senior Fund Manager - HDFC MF)

“India is near a key inflection point of Per Capita Income nearing \$4000 which is likely to boost the consumption in the coming year. Similar effect has been observed in many countries.”



Employee Felicitations



FLORENCE DEVANI
SENIOR WEALTH MANAGER



SIDDHESH GADKAR
SENIOR WEALTH MANAGER



JINAL JAIN
WEALTH MANAGER



MALLIKA MAPPADATH
WEALTH MANAGER



RIYA MOHEKAR
WEALTH MANAGER



SONAL CHAUHAN
WEALTH MANAGER



ARUSHI TEWARI
WEALTH MANAGER



HETANSHI SOLANKI
WEALTH MANAGER



SHRIHAN WALAWALKAR
INVESTMENT ANALYST

Employee Felicitations



ANJALI GIRI
WEALTH MANAGER



UTSAV PRADHAN
INVESTMENT ANALYST



SAMARTH CHOUKSY
PRODUCT MANAGER



ZANKHI PABARI
SOCIAL MEDIA MANAGER



NAMRATA RATNANI
SENIOR OPERATIONS MANAGER



PRANJUL MISHRA
OPERATIONS MANAGER

CELEBRATING OUR

TEAM'S PASSION, PERSEVERANCE, AND
ACHIEVEMENTS! TO TEAM WEALTHY NIVESH 🌟

Investors & Supporters Felicitations



MR. KAMAL KUMAR



MR. ANKUR TAYAL



MR. ANKIT TAYAL



MR. TCSM & MRS. SARITHA GUPTA



MR. SUDIPTA CHATTERJEE



MR. MANIK GOEL

Investors & Supporters Felicitations



MR. SHARWAN GOYAL



MR. SAILESH JAIN



MR. SHUBHAM PATEL



MR. ANKIT JAIN



MR. VIKRAM MAHADIK

Lunch & Networking





निवेश मिलन 2025 provided us a platform to bring industry veterans and our esteemed clients together. **For निवेश मिलन 25 we tried to have a money plus theme where in addition to investment topics, we also covered topics like Succession Planning and Taxation by respective experts.** New age investment tools like Quant Investing, Alternate Investments along with traditional discussion points like Valuations and Union Budget implications provided the audience a holistic view of the investment universe. निवेश मिलन 25 is a testament of our commitment for strong client engagement. We look forward to hosting more such events in the coming days.

Ankit Garg

CEO, Wealthy Nivesh



निवेश मिलन 2025 was a remarkable gathering of some of the brightest minds in the investment world—renowned fund managers, industry experts, and passionate investors—sharing invaluable insights and strategies. The event provided a dynamic platform for discussions on market trends, innovative investment strategies, and the future of wealth creation.

The enthusiasm and engagement we witnessed were truly inspiring, reaffirming our commitment to building a stronger, more informed investment community. A heartfelt thank you to all our participants, speakers and partners for making निवेश मिलन 2025 a resounding success. Your support drives us forward, and we look ahead to even greater milestones together!

Shrishti Sangal

COO, Wealthy Nivesh



निवेश मिलन 2025 is a testament of our commitment to being absolutely transparent with our clients. We brought together our clients, investors and the industry leaders to decode some of the most misunderstood topics in personal finance. **Eight leading fund houses participated in this mega-fest, covering the entire investment landscape right from Budget, Market Valuations, Alternative Investments, Quantitative Strategies to Taxation and Estate Planning.**

We would continue on our commitment to bringing the industry and investors closer, and simplifying the personal finance landscape for our clients.

Aditya Gupta

CIO, Wealthy Nivesh

WEALTHY NIVESH 
TRUST. SIMPLICITY. GROWTH

**Thank You for Being a
Part of**

निवेश मिलन 2025

