

ONE STOP SOLUTION FOR ALL YOUR INVESTMENT NEEDS



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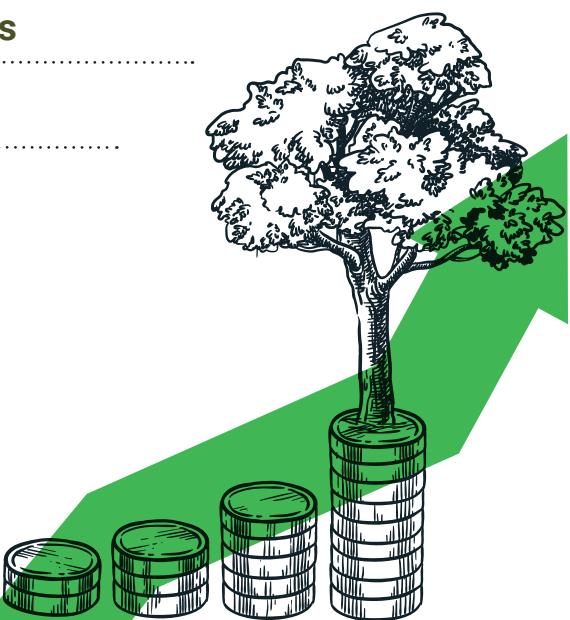
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About us

Anand Rathi Group is a reputed Indian financial services conglomerate with over **30+ years of experience** in investment services and capital markets. Established in 1994, we offer a comprehensive suite of services including **Investment Services across multiple asset classes, Wealth Management, Institutional Equities & Investment Banking, Insurance Broking, and NBFC solutions**, underpinned by rigorous research and client-centric strategies.

We have been widely recognised for excellence across the industry. At the **ET NOW World BFSI Congress & Awards 2020**, Anand Rathi received accolades including **Best Equity Advisor and Insurance Broker of the Year**, while our wealth management platform was honoured as the Fastest Growing Wealth Management Organisation.



Investment Products

Focused Equity Products*

VALUE PICK

ITF: 12 Months

AR Positional

ITF: 3-15 Days

PAIR TRADE STRATEGY

ITF: 1 Month

POWER PICK

ITF: T+5 Days

AR INTRA DAY

ITF: Same day

STOCK OPTIONS

ITF: 3-15 Days

STOCK MOVERS

ITF: 1-3 Months

ETF IDEAS

ITF: 1-3 Months

INVESTMENT baskets

Short / Medium /
Long term

ITF = Investment Time Frame

*Focused Equity Products are research based reports.

Investment Baskets

Investment Baskets are ready-made stock portfolios based on specific themes, goals and investment approach. The stocks are chosen using strong research, with a balanced mix of large-cap and mid-cap stocks.



Basket Categories

Technical Baskets

Momentum and theme based baskets with medium to short term investment horizon.

Fundamental Baskets

Theme based baskets with medium to long term investment horizon.

Key Features



Research-driven stock allocation



Discretionary portfolio construction



No Lock-in period



One-click investment



Periodic reviews



Live Performance tracking

Portfolio Management Services (PMS)*

PMS is a financial service provided to the clients by the fund manager where the fund manager designs a product that caters to the investment objectives and needs of the clients. The fund manager designs products on different categories of investors and their investment goals.



Our Offerings



Focus: Risk moderation by investing in multinational companies listed in India.



Focus: Multi-cap investments in rising enterprises with a strong corporate track record and sustainable business model, balancing value and growth strategies.



Focus: Optimization through multi-cap investments in companies with good corporate governance, strong emerging businesses, or companies entering the next business upcycle.

Key Features



Dedicated RM



Periodic portfolio review



Diversified strategy



Easy access to Fund Manager

Premium Subscription Services

» Value Added Scheme (VAS)

VAS is a brokerage subscription plan designed to offer cost efficiency along with access to value-added research and services.

Key Benefits



Choice of subscription plans



Competitive brokerage structures



Access to research and advisory services



Stock Lab

Stock Lab is a subscription-based portfolio evaluation tool that helps investors analyse their existing holdings and identify underperforming stocks.

Key Benefits



Periodic portfolio review



Detailed analytical insights



Seamless execution support

Funding Services

» Margin Trading Facility (MTF)*

Margin Trading allows investors to buy stocks by paying only a fraction of their value, with brokers funding the rest. This leverage lets investors invest more than their own capital, potentially boosting returns.



Increase Investment Capacity



Maximize Market Exposure



Competitive Interest Rates



Seamless Online Setup

» Securities Lending and Borrowing Mechanism (SLBM)

SLBM is a system that lets market participants lend or borrow existing shares. It serves as a tool for hedging risk, similar to using derivatives. The entire process is fully guaranteed after being cleared and settled.



Additional Income



Enables Short Selling



No Counterparty Risk



No Physical Settlement

Mutual Funds

A mutual fund is an investment where money from many investors is pooled together and invested in different asset classes such as equity shares, bonds, money market instruments, and commodities. This allows retail investors to invest with small amounts while benefiting from diversification.



Types of Mutual Funds



Equity Mutual Fund

These funds invest in shares of companies, based on the fund's objective. Their main goal is wealth creation or capital growth. Equity mutual funds are classified based on company size or investment theme, such as Large Cap, Mid Cap, Small Cap, Multi Cap, Sectoral, and Thematic funds.



Debt Mutual Fund

These funds invest in fixed-income instruments like government securities, treasury bills, commercial papers, and corporate bonds. They are generally less volatile than equity funds and aim to provide regular income. Debt mutual funds allow investors to invest in smaller amounts and are classified based on investment duration and risk, such as Liquid, Medium-Term, Floating Rate, and Credit Risk funds.



Hybrid Mutual Fund

These funds invest in a mix of equity and debt, aiming to provide both income and wealth creation.

The allocation between equity and debt depends on the fund manager's view. Hybrid funds are also classified based on their objective, such as Equity-Oriented Hybrid Funds and Debt-Oriented Hybrid Funds.

Ways of investing in Mutual Fund

» Systematic Investment Plan (SIP)

A SIP allows investors to invest a fixed amount regularly, usually every month, on a chosen date as per their convenience.



Benefits of investing via SIP



Rupee Cost Averaging

Consistently investing through SIP helps to average out the price at which we invest. The investor doesn't have to worry about entering the market at the correct time or at its low.



Convenience and Discipline

The SIP is automatically debited from the investor's bank account on a fixed date, making investing simple and disciplined without tracking the market.



Power of Compounding

Investing in small denomination over a long period of time results into earning more. Initially this compounding may look small but over a period of time it makes a huge difference.



Low Initial Investment

SIPs allow investors to start investing with amounts as low as ₹500.

» Lumpsum Investment

This method involves investing a single amount in a mutual fund at one time.

Benefits of investing via Lumpsum



Suitable for Long-Term Goals

Lumpsum investments are ideal when the investment horizon is long term.

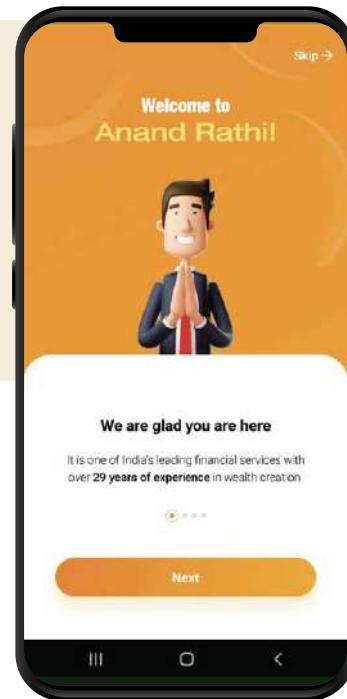


Market Opportunities

Along with SIPs, investors may benefit from investing a lumpsum during market corrections, though timing the market can be challenging.

AR INVEST App helps you to Invest in Mutual Funds with utmost ease and convenience

With decades of market experience, Anand Rathi's Mutual Fund services blend expert insights, technology, and tailored solutions to help you build wealth systematically and confidently. Choose from over 5,000+ schemes spanning equity, debt, hybrid, and thematic categories to meet different financial goals.



Discover 5000+
Mutual Funds at
your fingertips



Single point of
access to all
Mutual Fund needs



Invest in the Top
Performing
Funds



Unlock Expert
Curated
Investment Baskets

Commodity

Commodity markets allow investors to trade in gold, silver, energy, base metals and agricultural commodities. Investing in commodities helps diversify portfolios and can act as an effective hedge against inflation.

At Anand Rathi, commodity trading is supported by strong research, efficient margins and seamless digital platforms, helping investors trade with confidence in dynamic market conditions.



Why Anand Rathi for Commodities?



Proven Market Expertise
backed by decades
of experience



Wide Commodity Coverage
across metals,
energy and agri products



Strong Research & Insights
for informed trading
decisions



Seamless Trading Platforms
for smooth execution
and monitoring



Competitive Margins
for efficient capital
utilisation



Dedicated Support
from experienced
relationship managers



Our TradeMobi App

Your Trading Companion

Trade in Equities, Derivatives, and Commodities anytime, anywhere with speed, ease and confidence.

Features of TradeMobi App



Live Portfolio
Tracking and Control



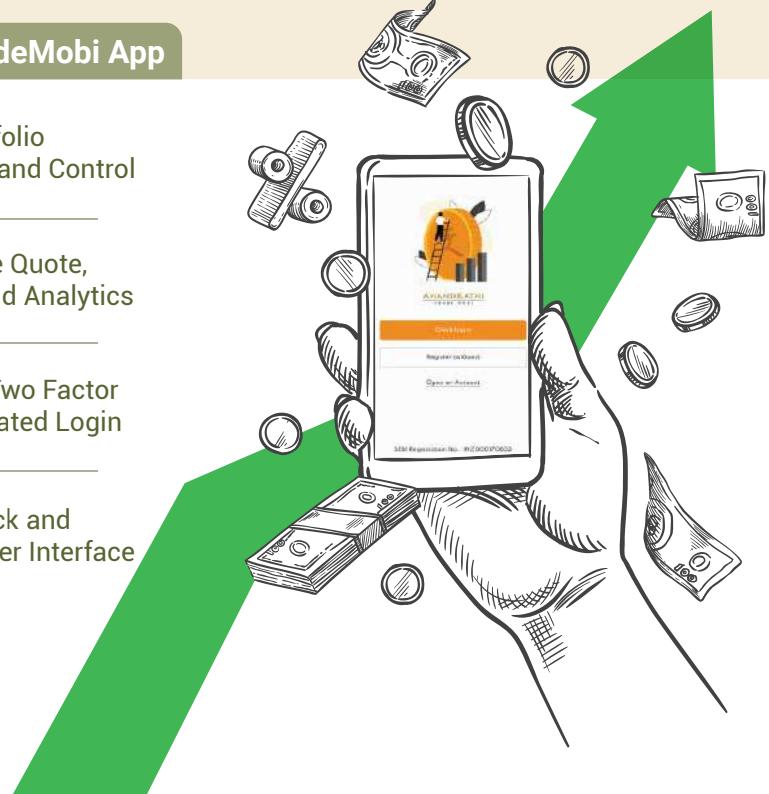
Real-time Quote,
Charts and Analytics



Secured Two Factor
Authenticated Login



Easy, Quick and
Stable User Interface



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Notes

Awards & Recognition

