

ABOUT THE GROUP

- > The Anand Rathi group came into existence in year 1994.
- > Mr. Anand Rathi and Mr. Pradeep Kumar Gupta laid the foundation of the Anand Rathi Group.
- ➤ With roots over 25 years deep, we have carved a niche in the financial services sector. The Anand Rathi Group offers a wide spectrum of services ranging from Investment services across Asset classes to Private Wealth, Institutional Equities, Investment Banking, Broking and NBFC.
- ➤ A customer-first approach coupled with digital innovation helps us contribute to the client's financial wellbeing.
- ➤ Holds Networth of more than Rs. 2,500 cr as on date with employee strength of more than 4,000.



"To be a leader in investment advisory, provide innovative financial solutions & be the first choice for clients and employees"

"We are client centric, with a clear focus on providing long-term value addition to clients, while maintaining the highest standards of excellence, ethics & professionalism"

Vision

Mission

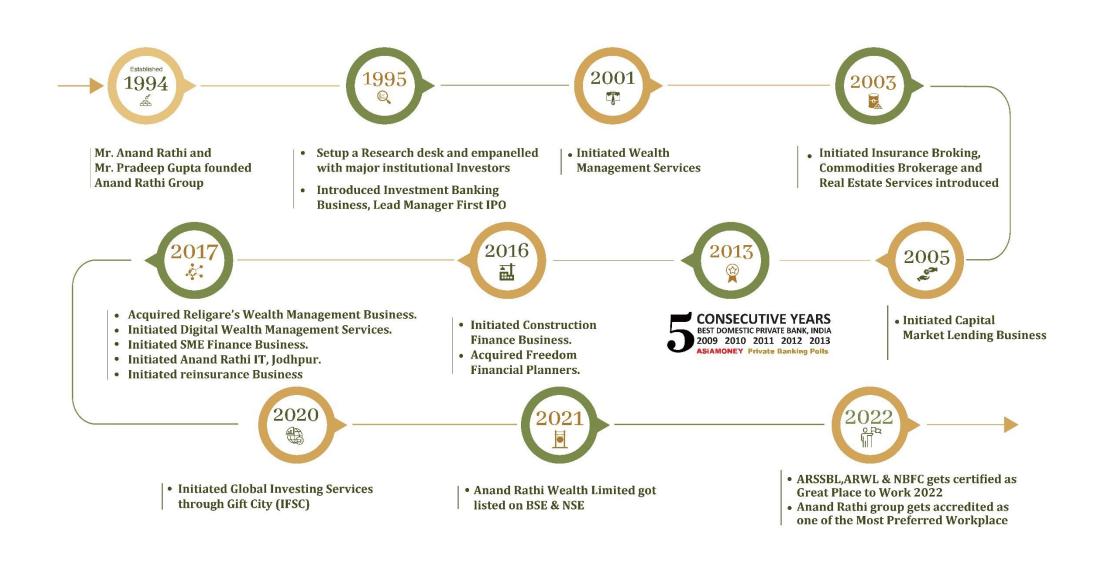


Family Culture

Integrity (Ethics)

Entrepreneurial Organisation

OUR JOURNEY



PROMOTER GROUP



Anand Rathi

Founder & Group Chairman

- Mr Anand Rathi is the founder and the soul of the Anand Rathi Group.
- **➢** Gold Medallist chartered accountant
- Leading financial and investment expert in India and the broader South-East Asian region.
- ➤ In 1999, Mr Rathi was appointed the **president of BSE** (Bombay Stock Exchange).
- Rapid expansion of BOLT the BSE Online Trading System, speaks high for his farsightedness.
- Set up the Trade Guarantee Fund
- Played a vital role in setting up the Central Depository Services (CDS).
- An esteemed member of the ICAI with experience of 53 years across sectors.



Pradeep GuptaCo-Founder & Group Vice Chairman

- Mr Pradeep Gupta is the co-founder
- Started career with a family-owned textile business, stepped into the financial world with Navratan Capital & Securities Pvt. Ltd. Lateron, Mr Gupta later joined hands with Mr Anand Rathi to establish the Group.
- Played a vital role in the success of the Institutional Broking and Investment Services arms
- Driving force behind the strong network of franchisees and branches across the country.



INVESTMENT **SERVICES**

- > We call ourselves as "Investment Services" entity
- > We cater to the financial requirements of clients with a **focused** approach.
- Provide Expert Research in various Asset classes like Equity,
 Commodities, and Currency
- Offer wide array of products across various asset classes.
- ➤ Offer high-tech digital apps and platforms as well as physical touch points through which Client can Invest in desired asset class.

Astute Leadership



ROOP BHOOTRA

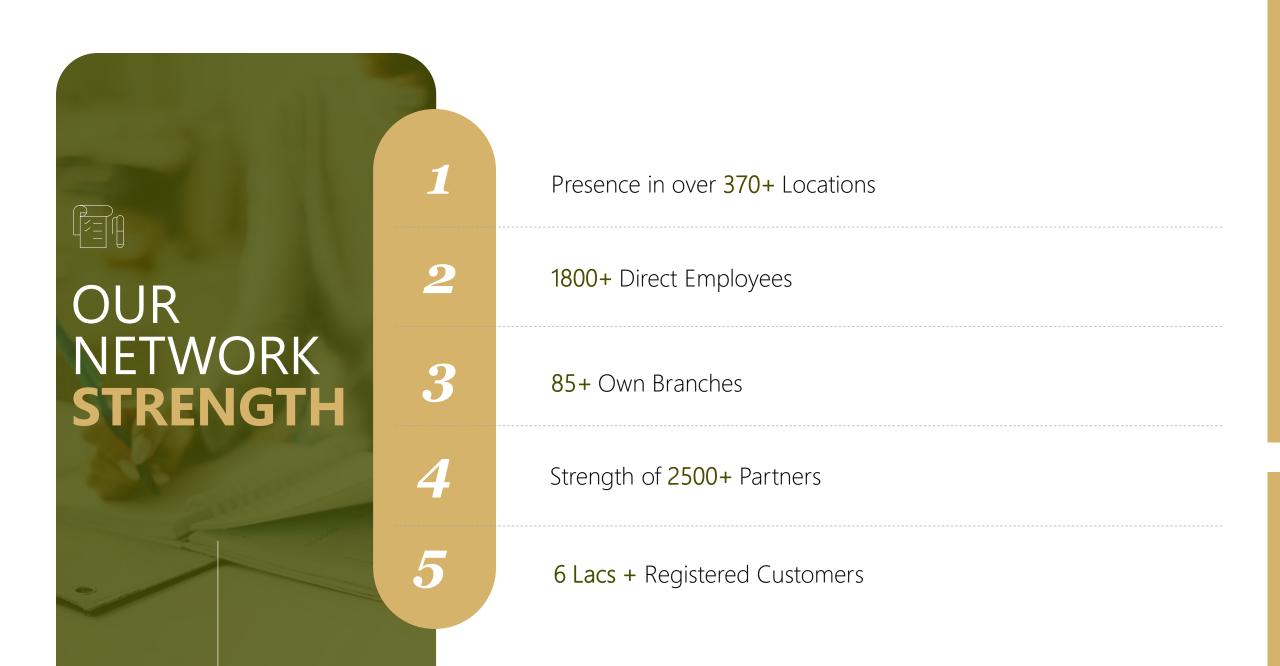
CEO, Investment Services

- ➤ A rank holder Chartered Accountant and began his career with the Anand Rathi group in the year 1995.
- ➤ He has over 25 years of Capital Market experience in the field of Building businesses, Creating Business Strategies, Sales, Operations, Process management, Accounting, Risk Management, and Technology upgradation.
- His core focus includes Business expansion, People Management, Key Partnership Development, and Tactical market planning.
- Under his spearheading leadership, the Broking & Distribution business has grown at a rapid pace

VISHAL LADDHA

CEO, Institutional Equity

- ➤ A Chartered Accountant with 28 years of experience and began his career with Anand Rathi group in the year 1994.
- ➤ One of the most well-known and trusted sales traders in the industry.
- His unique ability to source and place relatively illiquid stocks at low impact cost drives a large part of the Group's institutional equity
- Under his spearheading leadership, the IE business has grown at a rapid pace









FINANCE





















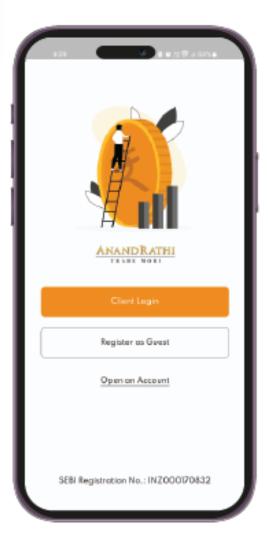
TATA CAPITAL







Trading & Investing Now Made Easier



Trading Features at your Finger Tips



Comprehensive Dashboard that gives snapshot of your trading account



Real-time Quote, charts & analytics



Track and Manage Portfolio – Real-time



Detailed Market Information

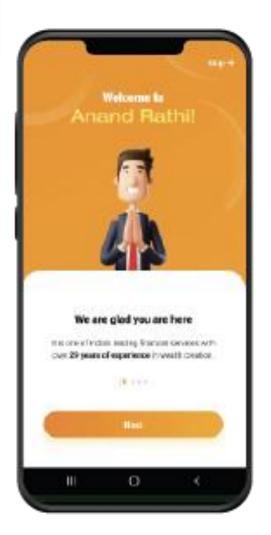


Trading tools to take informed decisions



Easy & Secured User Interface





Investing Features at your Finger Tips



Discover 5000+Mutual Funds at Your Fingertips



Unlock Expert Curated Investment Baskets



Single point of Access to All Mutual fund Needs



Invest in the top performing funds based on their returns



Dynamic Investment Picks

– Strategically Categorized
Schemes for Investing in
Lumpsum ,SIP, High
Returns & ELSS.



Interactive Calculator
Displayed on Screen helping
to take informed decision



Our Digital Offerings













Various Research Reports with Frequency











Value Pick ITF: 12 months



Intellect Ideas ITF: 12 months



Momentum Buy ITF: 3-15days



Short Term Technical Trading ITF: 3-15 days



Stock Options ITF: 3-15 days



Power Pick ITF: T + 5 days



Stock Movers ITF: 1-3 months



Pick for the month ITF: 1 month



T20 ITF: 1 month



Investment Baskets
Short/Medium/Long term



Investment Baskets

Investment Baskets are a
Portfolio of Stocks with the
blend of the Thematic
Equities. Each basket differs
in its Goals. Basket is curated
using efficient strategies and
in-depth analysis.

Types of Investment Baskets?



Technical baskets are momentum & theme based investment baskets with medium to short term Investment horizon.



Fundamental basket are theme based investment baskets with medium to long term investment horizon.

Features of our Investment Baskets



Power Of Discretion



No Lock-in period



Single click to invest



Dynamic Research Based Stock Allocation



Periodic Review



Live Performance tracking

Our Top 10 Baskets









Fixed Income Instruments*

A fixed-income instrument is a debt instrument issued by a government, corporation etc. to finance & expand their operations through fixed periodic payments and eventual return of principal at maturity.



Fixed Income Instruments We offer



Corporate Fixed Deposits



Market Linked Debentures



Debt Mutual Funds



Debt Alternative Investment Funds



Tax Free Bonds



Corporate Bonds



Capital
Gain Bonds



Sovereign Gold Bonds



Key Benefits

Portfolio Management Services

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.



Dedicated RM to advise and guide you



Periodic updates to review you investment portfolio



Diversified strategy to churn out maximum yield from your investments



Easy assess to fund manager

Our Offerings







Third Party Offerings











Mutual Funds*

Mutual Fund is an investment pool wherein money is collected from various investors to make a pooled investment in various asset classes like equity stocks, bonds, money etc.

Types of Mutual Funds







Ways of Investing in Mutual Funds

Systematic Investment Plan (SIP)

A systematic investment plan allows the investor to invest a fixed amount in the selected Mutual Fund periodically, usually monthly on a specific date selected as per their convenience.

Lumpsum Investment

This is a method of investment in which you invest a single sum of money in a Mutual Fund in one go.

Key Benefits









Rupee Cost Averaging

Convenience & Discipline

Power of Compounding

Low Initial Investment

Key Benefits





Beneficial for Long Term

Market Timing





Margin Trading Facility (MTF)

Margin trading is a facility under which investor is allowed to buy stocks by paying a marginal amount of the actual value of shares. This margin can be paid either in cash or in shares as security.



Increases Investment Capacity



Additional Exposure on Investment



Easy Online Activation



Optimum Interest is Charged



Enjoy Dividends and other benefits

Securities Lending & Borrowing Mechanism

Securities Lending and Borrowing Mechanism (SLBM) is a way through which investors can borrow or lend shares to other market participants.



Additional Income



No Counter Party Risk



No Physical Settlement



Enables Short Sell



AlgozyThe Future of Trading

Algozy is a robust API (Application
Programming Interface) that assists
you to build
trading systems & strategies easily
and smartly. Our Algozy API gives
you free access to live Market data,
Orders, Real-time execution with few
lines of code.



Simple API integration process



Connect any front-end application



Integrate with thirdparty tools



Algozy APIs are free of cost

Algo Front-End Applications



TRADETRON is a web-based Algo strategy marketplace and there are 1000+ pre-define strategies with back-tested data analysis available for a client which they can deploy & execute in live market and users can build their own Algo strategies with few line of codes



Greeksoft Application is a market leader in Automated Trading Software & Risk Management Industry. The Application provides trading platform equipped with in-built intelligence and low latency. Besides Front end execution trading solutions, they also specialize in risk management tools that help to get insights on trading risks in exchange-traded derivative instruments.



STOXXO will act as an advanced bridging application between the execution platform & API. It will also help to execute the strategies through Trading view, AmiBroker, Ninja Trader, MT4, etc.



FOXTRADER is a new trading platform with advanced charting & trading strategy development on manual and automated trading. In the Fox Trader application, there are 450+ study indicators, 15+ signal scanners, and predefined ready strategies are available.



Commodities

Commodity derivatives are investment tools that allow investors to profit from certain commodities without possessing them. The buyer of a derivatives contract buys the right to exchange a commodity for a certain price at a future date. The buyer may be buying or selling the commodity.

Advantages of Investing in Commodities



Lower Margin

The margin can be close to 5-10% of the total value of the contract. This is much lower than the margin required for other asset classes.



Liquidity

It is easy to buy and sell commodity futures. An investor can liquidate his position whenever required.



High Returns

The investors can take larger positions while investing lesser amounts of capital. This also helps increase the potential for higher profits.



Protection against inflation

The demand for goods and services rise. It leads to an increase in the price of the goods and services as the cost of the raw materials i.e. commodity increases



Diversification

Commodities have negative or low correlation with stocks. Due to this negative correlation, where an increase in commodity prices drives down stock prices, the losses incurred by stocks can be adjusted against the gains made by commodities derivatives.



Currencies

Currency derivatives are contracts that derive their value from their underlying asset, the currency. Currency derivatives help protect against price volatility of the underlying asset in the future and are widely used by traders as a risk management financial instrument.

Benefits of Currency Derivatives



Hedging

Hedging is a risk management instrument against any undesirable fluctuations in currency rates in the future



Highly Liquid

The most liquid market in the world is said to be the foreign exchange market. This is due to the availability of numerous traders and buyers.



No Manipulation

Due to the giant size of the market and numerous players involved, it's impossible to manipulate the market.



Fixed Lot Size

A lot size means the number of currency units per lot. The biggest advantage to this is that traders who participate in these contracts can trade multiple lots per contract.



Low Margin

You can just pay 2-3% of the value while trading currency derivatives instead at the full traced value. The percentage value is called the margin amount.



Value Added Scheme (VAS)

VAS is a new and innovative scheme that is a win-win for us as well as clients. We win because we get fixed brokerage as subscription and clients win as they benefit from lower brokerage.



Exclusive access to our Telegram
Channel



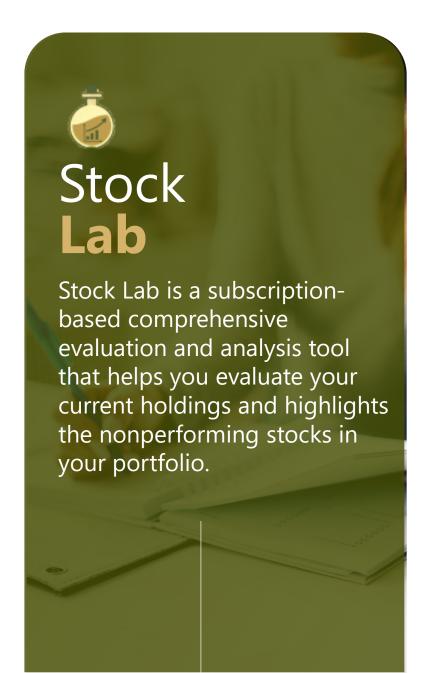
Exclusive Call & Trade Facility



Exclusive access to every Research report that we publish



Free One time Portfolio Evaluation Service





RIA Baskets (External Advisory)



Abakkus is an alpha focused boutique asset manager managing roughly INR 10,000 crores* in long only strategies for Indian equities.



In order to achieve superior risk-adjusted returns over a long period, Narnolia adheres to the "growth in value" investment philosophy.

AWARDS & ACCOLADES

























www.anandrathi.com

CORPORATE OFFICE:

11th Floor, Times Tower, Kamala City, Senapati Bapat Marg, Lower Parel, Mumbai - 400 013



ANANDRATHI INVESTMENT SERVICES

