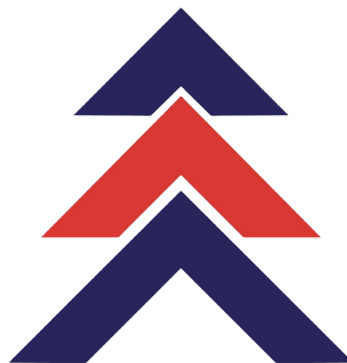


INVEST SMART, INVEST WITH SATCO



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Head Office: Quest 5th Floor, Technopolis Knowledge Park, Hanuman Nagar,
Chakala, Andheri East, Mumbai 400093

Disclaimer: "Mutual Fund investments are subject to market risks, read all scheme related documents carefully."

OUR TEAM



DEEPAK JAGGI
Co Founder and MD:

Having over **30** years of experience in financial services including Capital Markets, PMS, Private Banking, Insurance and MF. His last assignment was with PGIM Mutual Fund as an Executive Director.



SANJIB PARHI
Co Founder and Director:

With over **30** years of experience in retail distribution and HNI wealth management, specialized in insurance, wealth products, and business development, previously worked at HDFC Life (AVP) and Financial Technologies.



JAYASIMHA AS
Mentor – Strategy

Veteran financial services professional with **37+** years of experience, former LIC executive, founding member and senior management professional at HDFC Life, organisation transformation experience alongside McKinsey & BCG; currently Promoter Director at Capvirgo Insurance Broking, specializing in sales, distribution & Indian markets.

OUR SERVICES



Retirement Savings
Children's Education Solutions
Portfolio Restructuring
Tax solutions

Mutual Funds & SIF
Tax-Free Bonds, NCDs
Stocks & Global Stocks
PMS, AIF & Gift City

Insurance
Wills & Legal
Loans

ABOUT US

01

HOLISTIC WEALTH MANAGEMENT

Built on four pillars — **Creation, Preservation, Protection and Transmission.**

02

GOAL-BASED APPROACH

Converting life goals into clear, measurable financial objectives.

03

RIGHT INVESTMENT CHOICES

Selecting suitable financial instruments for each stage of the journey.

04

TRUSTED SAARTHI

A disciplined approach towards investment and wealth creation.

150+ YEARS

of collective team experience in financial services, wealth management & distribution

OUR METHODOLOGY

STEP 01

Fill a risk profile
questionnaire

STEP 02

Receive your risk tolerance
report

STEP 03

Get your portfolio
constructed

Profile Assessment & Custom Portfolio Build

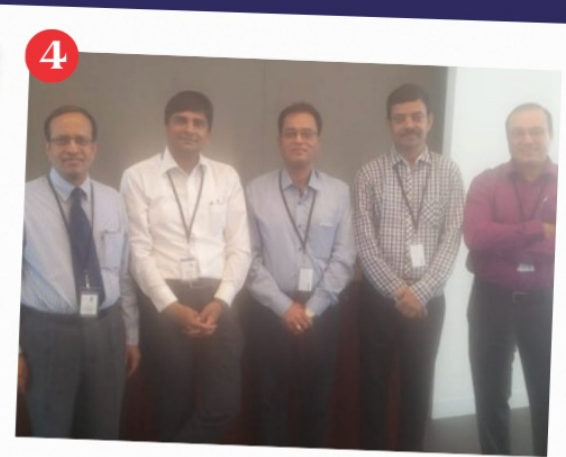
50 AMCs & 120 PMS / AIF Managers — 5,000+ Products

Quantitative Research Filters — 300 Products

Qualitative Screening — 100 Products

**Final Portfolio — 4–12
Investor-Suited Products**

INDUSTRY CONNECT



1. Mr. **Nilesh Shah** (CEO & MD) Kotak Mahindra AMC

2. Mr. **Sundeep Sikka** (ED & CEO) Nippon India Mutual Fund

3. Mr. **Navneet Munot** (MD & CEO) HDFC AMC

4. Mr. **Suresh Soni** (CEO) Baroda BNP Paribas AMC

5. Mr. **Prashant Jain** (Co-Founder & CIO) 3P Investment Managers

6. Mr. **Vishal Kapoor** (MD & CEO) Bandhan Mutual Fund

7. Mr. **Ramesh Mantri** (CIO & Head Equities) WhiteOak AMC

8. Mr. **Amitabh Chaudhry** (MD & CEO) Axis Bank

9. **E.A. Sundaram** (ED & CIO) BugleRock Capital

OUR VALUE PROPOSITION



Regulatory & Compliance Readiness

VAPT & ISO Certified,
Private VPN, Secured on
AWS.



Industry Connect

Timely market updates.



Proactive Monitoring of Your Investments

Continuous review and
timely rebalancing.



Online Execution + RM Support

Quick execution when
markets or needs change.

Satco Wealth offers personalized services to grow, safeguard, and seamlessly transfer your wealth to next generation.

PRODUCT INSIGHTS

Market Update



Latest NAV

Listed AMC wise latest NAV



Market Indices

Daily Statistics of Market

Financial Tools



Lumpsum
Calculator



SIP Calculator



Cost of
Delay SIP



Education
Calculator



Marriage
Calculator



Retirement
Calculator



SIP Tenure



EMI Calculator



SIP Step-up
Calculator



SIP Planner



STP Planner



SWP Planner

Portfolio Review

Regular market
updates

Updates on latest
NFO

Notifications of SIP
schemes

Updated NAV

Access to financial
calculators

Fund Picks

For representation purposes only

Category

Source : AMFI, Scheme Factsheets

All



Nippon

20.25%



Invesco

18.2%



Nippon

17.93%



Quant

17.92%



Edelweiss

17.87%



HSBC

17.4%



HDFC

17.24%



ICICI Pru

17.08%

6M

1Y

2Y

3Y

5Y

10Y

Market Data [31 Jul 2026 15:34]

Name	Previous	Current	Change
S&P SENSEX	77,928.15	78,094.64	0.21%
NIFTY 50	24,317.15	24,383.60	0.27%

Bullion [30 Jul 2026 17:58]

Name	Unit	Price	Change
GOLD	10 gm	1,42,809	0.74%
SILVER	1 kg	2,18,838	0.53%

Debt Market [30 Jul 2026]

Name	Previous	Current	Change
Gilt 1 year	5.738%	5.784%	0.05%
Gilt 10 years	6.809%	6.800%	-0.01%

Global Indicator [30 Jul 2026]

Name	Previous	Current	Change
Gold(\$/t oz)	4,065.20	4,102.60	0.92%
Euro	109.78	109.83	0.05%
Crude Brent(\$/bbl)	88.09	86.88	-1.37%
S&P 500	7,316.15	7,437.63	1.66%
NASDAQ	24,442.90	25,122.20	2.78%
US Dollar	95.32	95.44	0.13%
DJIA	51,594.10	52,208.10	1.19%

CONNECT WITH US



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