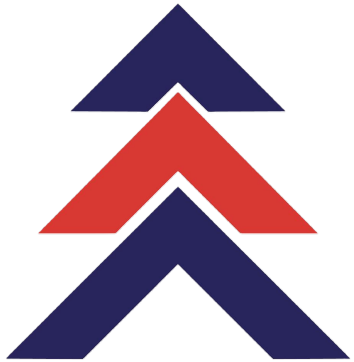
SATCO WEALTH

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."

AMFI Registered Mutual Fund & SIF Distributor - ARN: 159693
APMI Registered PMS Distributor - APRN00623 | AIF Distributor

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



Marriage, Retirement Savings Children's Education Solutions Portfolio Restructuring Tax solutions	Mutual Funds & SIF Tax-Free Bonds, NCDs Stocks & Global Stocks PMS, AIF & Gift City, NRI	Insurance Wills & Legal Loans HUF Formation

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

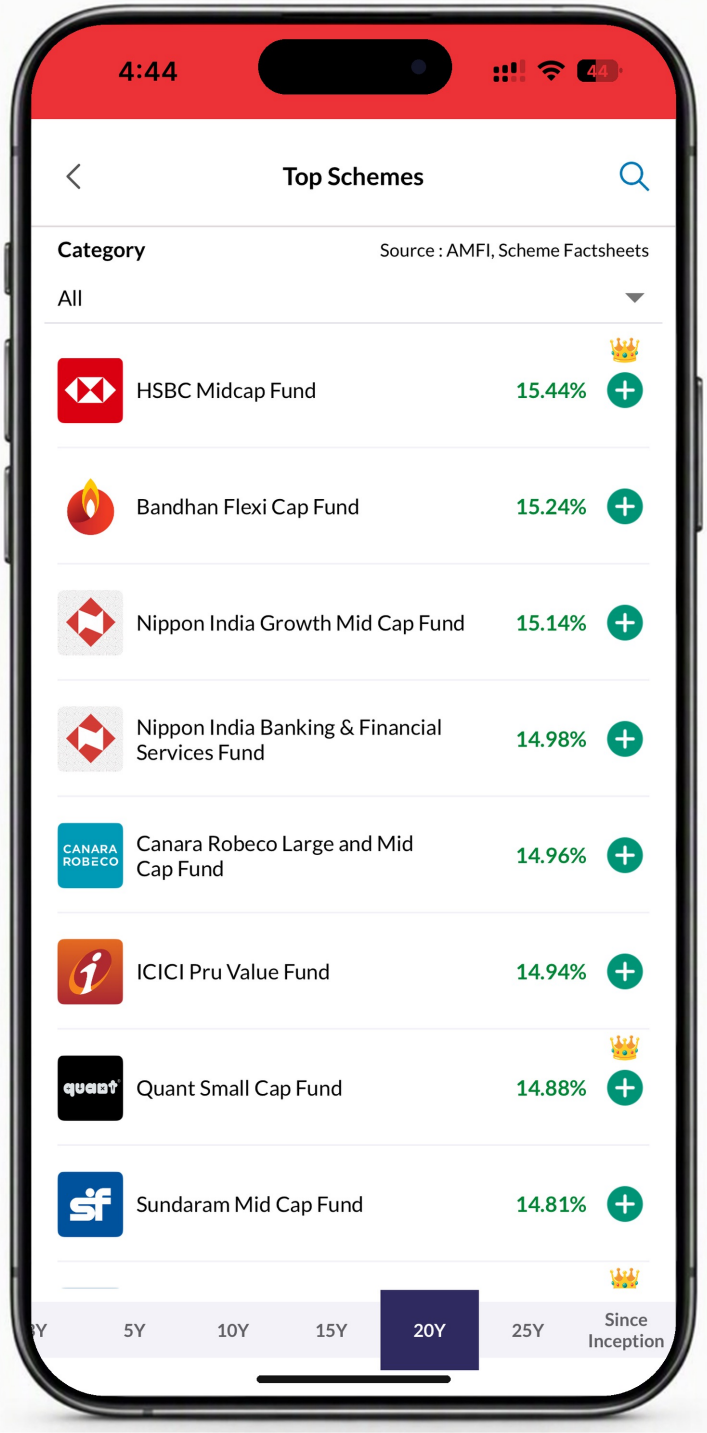
Regular market updates

Updates on latest NFO

Notifications of SIP schemes

Updated NAV

Access to financial calculators





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For AMC Registration code check our Website: www.satcowealth.com

Visit SEBI for (SID, SAI, KIM) https://www.sebi.gov.in/filings/mutual-funds.html

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