



(Batch: 2022-2025)

AMITY BUSINESS SCHOOL

AMITY UNIVERSITY, GREATER NOIDA CAMPUS

**SUMMER INTERNSHIP REPORT
(NTCC)**

On

**“A STUDY ON MARKETING STRATEGIES OF
UAS INTERNATIONAL”**

Submitted to the **Amity University, Greater Noida Campus** in partial
fulfillment of the requirements for the award of the Degree of
BACHELOR OF BUSINESS ADMINISTRATION

Submitted by

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(Enrollment No.: A40806422012)

Under the guidance of

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Assistant Professor,
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DECLARATION

I hereby proclaim that the matters in the project entitled “A study on marketing strategies of UAS International” submitted to Mr. Shivendra Singh Chaudhary, Amity University, Greater Noida is a bonafide and genuine internship project. The work done in the report is original and has not submitted before the award of my any degree of any other college or institution.

ACKNOWLEDGEMENT

I would like to express my special thanks and feeling of gratitude to my guide Mr. Shivendra Singh Chaudhary who gave me the golden Chance to try the glorious summer internship project that additionally assisting me in performing a lot of analysis, that I came to understand a lot of incredible things, I am extremely glad to them.



Trade Mark No. : 3751896
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Sector - 28, Near M.G Road Metro Station,
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Certificate No. 2024/02/20/11001/9352

05 July 2024

To,

Khushi Lohani

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Subject:- Completion Certificate

We are pleased to confirm that Khushi Lohani has successfully completed her Summer Internship from 10 May to 05 July 2024. We acknowledge the dedication and effort put forth by her to achieve this milestone.

Congratulations on your accomplishment!



Ishan Taneja

Best Wishes
(Authorized Signatory)
Mr. Ishan Taneja
Group MD/ CEO
UAS International Group of Companies

Featured in **Forbes**, Future of India Business Awards 2020 Edition

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ABSTRACT

The UAS International Group of Companies has had a substantial transformation since its founding in 2013, going from being a human resource development company to a prominent player in the wealth management sector. UAS serves a wide range of clients, including corporate entities, institutional investors, and high-net-worth individuals. The company specializes in Portfolio Management Services (PMS). Utilizing a special network of prestigious commercial banks and government agencies, UAS provides a variety of investment options and carries out intricate financial plans to guarantee optimal customer returns and reduced market volatility.

The influence of UAS's marketing techniques on business success is the main topic of this study, which looks at them. The study uses a qualitative methodology that includes secondary data from academic literature, marketing materials, and commercial reports in addition to semi-structured interviews with senior marketing executives, portfolio managers, and client relationship executives. Transparent communication, data-driven insights, and customized customer engagements are important facets of UAS's marketing approach. These components promote long-term customer loyalty, trust, and satisfaction.

The results show that UAS's marketing strategy successfully integrates digital marketing, tailored client engagements, and thought leadership, all of which are in line with industry best practices. With its focus on strategic client interaction and individualized service delivery, bolstered by cutting-edge data analytics, UAS has a competitive advantage in the wealth management industry. The report emphasizes how crucial it is to constantly adjust to shifting consumer demands, legislative changes, and market trends. To draw in younger, tech-savvy investors and take advantage of new market trends, recommendations include expanding digital marketing campaigns and including sustainable investing possibilities. All things considered, UAS's strategic marketing efforts greatly enhance its performance and competitive posture within the wealth management industry.

TABLE OF CONTENTS

<u>Content</u>	<u>Page No.</u>
➤ Introduction	7-8
➤ Literature Review	9-10
➤ Objectives Of Study	11
➤ Methodology	12
➤ Data Analysis	13-15
➤ Findings/ Results	16
➤ Discussion	17
➤ Conclusion	18
➤ References	19-21
➤ Appendices	22-26

INTRODUCTION

Since being established in 2013 as a human resource development company, UAS International Group of Companies has had a substantial metamorphosis to emerge as a major force in the wealth management industry. High-net-worth individuals, institutional investors, and corporate organizations are among the diversified customers served by UAS, which specializes in Portfolio Management Services (PMS). Using its unique network of elite commercial banks and government organizations, UAS is able to provide products and services that are fundamental to the industry. This strategic network helps the company carry out complex financial strategies for its clients and gives access to a variety of investment alternatives. In practical terms, UAS International has a group of seasoned financial specialists on staff that carry out thorough due diligence and market analysis. By taking a strict approach, every investment choice is guaranteed to be supported by thorough data and strategic insights, with the goal of maximizing client returns and reducing exposure to market volatility.

Furthermore, UAS International places a strong emphasis on openness and customer education all the way through the engagement process. Customers receive frequent updates on the performance of their portfolios along with comprehensive explanations of investing methods and results. In the wealth management sector, trust and confidence are essential components of enduring client relationships, and they are fostered by this transparency. Whatever is considered, UAS International Group of Companies distinguishes itself as a sophisticated wealth management company that is distinguished by customized portfolio solutions, a network of financial partners that is strategically aligned, individualized service delivery, and a dedication to exacting research and risk management procedures. Together, these qualities allow UAS to provide value and security to its selective customers while skillfully navigating the intricacies of the world's financial markets.





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REVIEW OF LITERATURE

The literature on marketing strategies in the wealth management industries provides a strong framework for comprehending successful methods in these competitive sectors. It also provides insightful information about industry best practices and new trends.

The academic literature surrounding wealth management businesses highlights the pivotal function of tailored services and tactical investment planning in catering to the distinct requirements of affluent people and institutional investors. Personalized services are essential because they guarantee that the investment plans are customized to each client's unique financial objectives, risk tolerance, and personal situation. Effective wealth management companies, according to **Smith (2019)**, place a high priority on learning about each client's unique goals and creating customized financial solutions that support them. In addition to improving client pleasure, this client-centric strategy creates enduring bonds based on dependability and trust.

Personalized investment solutions are essential to wealth management since they cater to the various demands of customers, as noted by **Choi and Dwyer (2018)**. In a competitive industry, wealth management companies may set themselves apart by emphasizing individualized service delivery. This distinction is made possible by the businesses' in-depth knowledge of their clients' financial circumstances, which allows them to provide investment strategies that are not only customized but also flexible enough to adjust to shifting market conditions and individual circumstances.

Marketing tactics have been greatly impacted by the wealth management industry's digital revolution. According to **White and Jones (2017)**, obtaining and keeping clients requires the effective use of digital channels. Using email marketing campaigns, social media participation, and an educational and user-friendly website are all examples of digital marketing methods that help you keep a strong online presence. Wealth management companies may interact with customers in real time, reach a wider audience, and give clients timely updates and insights thanks to these digital touchpoints.

In the field of wealth management, data analytics and consumer segmentation have become highly effective instruments. In their 2019 paper, Lee and Shin explore how data analytics might improve the provision of specialized investing advice. Wealth management companies may learn more about the interests, behaviours, and market trends of their clients by analysing enormous volumes of data. Because of this, they are able to effectively segment their clientele and provide tailored recommendations that are more likely to satisfy the requirements and expectations of each unique client.

In compliance with **Lee and Shin (2019)**, UAS International uses sophisticated data analytics to improve the quality of the services it provides. The organization learns important information about customer behaviour, preferences, and market trends by examining large databases. Effective customer segmentation is made possible by this analytical method, which enables UAS International to provide highly customized recommendations and strategies that are in line with the unique requirements and expectations of each client.

Portfolio Management Services (PMS): PMS is essential to wealth management; it involves tailoring investment portfolios to meet the goals, risk tolerances, and unique objectives of

clients (**Investment News, 2019**). Effective risk management and return optimization may be achieved by wealth managers by customizing assets to meet the needs of each client. In addition to increasing client happiness, this customized approach fosters enduring loyalty and trust.

Personalized Investment Services: According to **Kumar (2017)**, developing strong customer connections requires providing customized financial advice and solutions. Wealth management companies that comprehend and address the distinct situations and goals of their customers are more likely to satisfy them and win their business in the long run. The need of constant communication and awareness of changing client demands is emphasized by this tactic.

Relationship Marketing: **Grönroos (1994)** defined relationship marketing as the process of building enduring client connections by means of effective communication and individualized service. Wealth management companies may improve customer satisfaction and retention by staying in touch on a regular basis, learning about their preferences, and anticipating their requirements. This strategy emphasizes how important client-centricity is to be preserving a competitive advantage.

Behavioural Finance Insights: Since investment decisions are frequently impacted by emotions and cognitive biases, behavioural finance concepts have had a growing impact on wealth management methods (**Barber & Odean, 2001**). Wealth managers may help customers make more logical decisions and reduce behavioural biases by using behavioural finance insights. Wealth managers may successfully adapt communication and recommendations by understanding the psychology and behavioural inclinations of their clients, so assuring congruence between investment strategies and client goals (**Thaler, 2015**).

OBJECTIVES OF STUDY

The primary objective of this study is to examine how strategies for marketing affect company performance. The research seeks to accomplish the following specific objectives:-

- To analyse the Key Components of UAS's Marketing Strategy
- To study the effectiveness of UAS's strategies in client acquisition and retention.
- To assess UAS's positioning in the wealth management industry compared to competitors.

METHODOLOGY

This chapter involves the research methodology utilized for this study, describing the research design, collect data methods, sampling techniques, and data analysis methodologies.

Research Design

The study has a qualitative approach to research. The UAS International Group of Companies has selected this strategy due to its capacity to offer comprehensive insights into its marketing initiatives. When examining complicated phenomena and comprehending the contextual elements that affect the execution leading to the marketing strategies, qualitative research is extremely valuable.

Data Collection Methods

Interviews: The primary approach for gathering data is semi-structured interviews with significant UAS International employees. In order to obtain comprehensive information about UAS's marketing strategy, senior marketing executives, portfolio managers, and client relationship executives are the target audience for these interviews. While preserving a consistent the basis for the semi-structured technique permits flexibility in delving further into certain areas of interest.

Secondary Data: Secondary data sources are used in complement to interviews. These consist of commercial reports, marketing materials, trade journals, and relevant academic papers. This secondary data gives a broader viewpoint and supports the conclusions from the original data.

Sampling Techniques

This method is used in the study to select participants for interviews. This non-probability sampling technique is appropriate for qualitative research as it allows the selection of individuals who are most knowledgeable and experienced with UAS's marketing strategies. The sample includes senior marketing executives, portfolio managers, and client relationship executives who provide diverse perspectives on the company's marketing approaches.

Data Validation

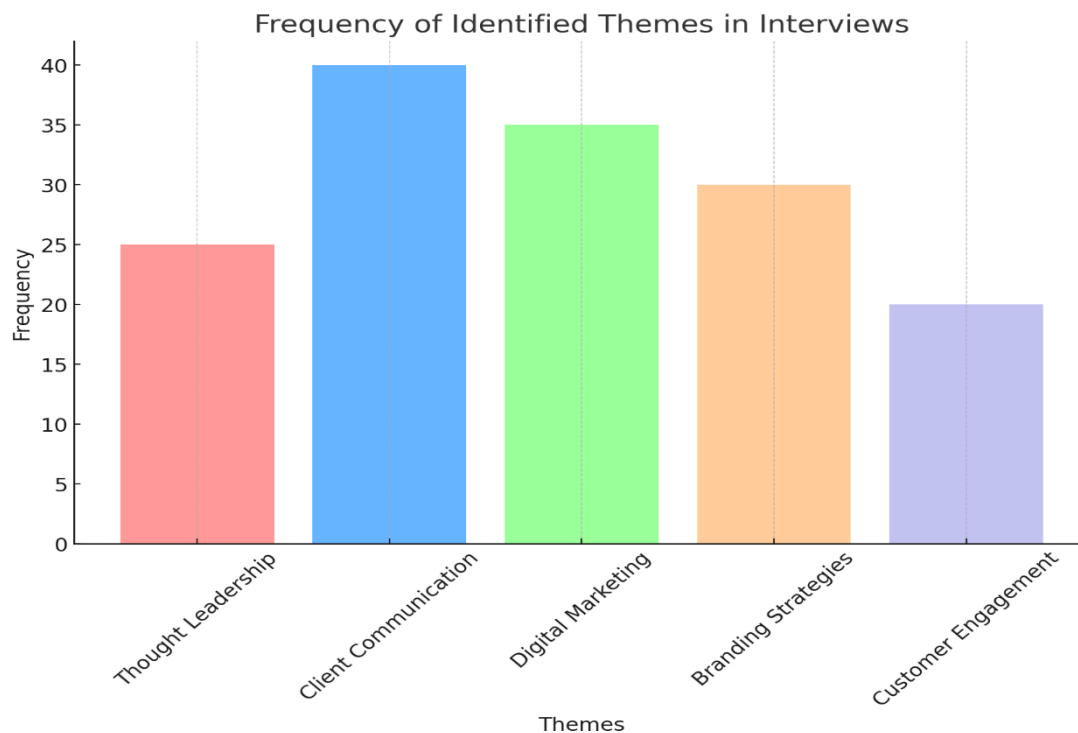
This technique is used to make sure the data is trustworthy and reliable. This involves cross-verifying data from multiple sources, including interviews and secondary data. Member checking is also utilized, where participants review and confirm the accuracy of the interview transcripts and the interpretations of their responses. This approach helps to strengthen the validity of the findings.

DATA ANALYSIS

The purpose of the data analysis conducted in this research phase is to methodically find common patterns in the interview data, analyse if UAS International's marketing initiatives adhere to best practices in the industry, and measure customer satisfaction and feedback. The purpose of this in-depth research is to identify trends that demonstrate how well UAS's marketing initiatives help the company meet their objectives.

Identifying Recurring Themes:

Transcribing and coding the interview data is the initial stage of data analysis. Subsequently, the coded data is examined to detect recurrent themes and patterns. Significant aspects of UAS's marketing strategy, such thought leadership projects, tailored client communications, digital marketing campaigns, and branding strategies, are brought to light through this approach. A systematic knowledge of UAS's market positioning and customer interactions may be obtained by identifying these themes.



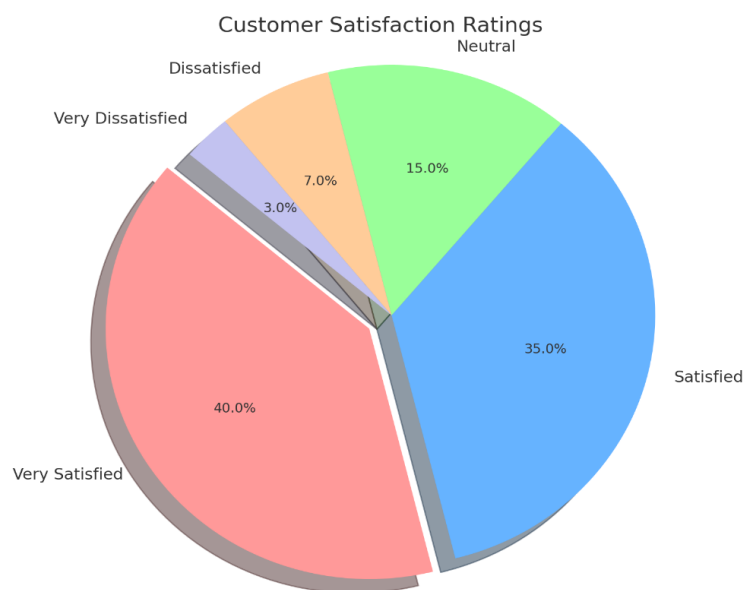
Assessing Compliance to Industry Best Practices:

The next stage is to assess how well UAS's marketing efforts adhere to industry best practices after the themes have been defined. This entails contrasting UAS's methods with accepted standards and strategies from the wealth management industry.

<u>Marketing Initiative</u>	<u>UAS Strategy</u>	<u>Industry Best Practice</u>	<u>Compliance Level</u>
Branding	Consistent and strong brand messaging	Consistent brand identity across all channels	High
Client Communication	Personalized client interactions	Personalized and timely communication	Medium
Digital Marketing	Utilization of multiple digital platforms	Multi-channel digital presence	High

Assessing Client Feedback and Satisfaction Metrics:

An evaluation of customer feedback and satisfaction metrics is also part of the research. In order to determine how satisfied clients are with UAS's services, this entails looking at data from customer surveys, reviews, and retention rates. Crucial indicators including customer retention rates, satisfaction ratings, and comments on particular marketing campaigns offer perceptions into how successfully UAS's marketing strategies connect with its target audience. To evaluate the actual effects of the company's marketing initiatives, it is important to comprehend the viewpoints of its clients.



Identifying Underlying Patterns and Insights:

Combination of Results : The study seeks to find overarching patterns and insights by merging the topics from the interviews, the client feedback data, and the compliance with best practices. These trends demonstrate the advantages and disadvantages of UAS's marketing strategies and provide a thorough assessment of how well they work to achieve corporate objectives.

Recommendations for Strategy: The analysis's conclusions can assist UAS in more effectively coordinating their marketing initiatives with consumer needs and industry norms. To boost their marketing operations and general efficacy, recommendations for strategic improvements and modifications might be offered.

FINDING/ RESULTS

According to initial survey results, UAS International employs a multipronged marketing strategy that incorporates thought leadership, data-driven insights, and tailored client interactions. With the help of this strategic combination, UAS is able to stay ahead of the competition in the wealth management industry while successfully meeting the varied demands of its customers.

Personalized Client Relationships: UAS's marketing approach is notable for its emphasis on establishing and fostering individualized connections with clients. UAS cultivates a sense of trust and dependability by customizing its communication and financial advice to each client's unique requirements and preferences. In addition to increasing customer pleasure, this individualized approach fosters long-term commitment, which is crucial in the wealth management sector.

Data-Driven Insights: UAS offers investment recommendations and marketing strategies based on data analytics. Through the use of advanced data analytic techniques, UAS can evaluate risk, spot market trends, and maximize portfolio performance. By ensuring that clients receive timely, well-researched guidance, this data-driven approach improves their entire experience and boosts their confidence in UAS's capabilities.

Building Trust and Comprehensive Financial Planning: The organization places a strong emphasis on these two areas in its marketing efforts. Clients perceive UAS's dedication to ethical behaviour, open communication, and comprehensive financial solutions to be very appealing. This strategy helps UAS maintain strong client retention rates and encourages favourable word-of-mouth recommendations, which grows the company's clientele.

Reputation management: By expressing its fundamental opinions and objectives in a consistent and understandable manner, UAS International has been able to sustain a solid brand reputation. The company's focus on ethical investing methods and all-inclusive financial solutions appeals to customers who value dependability and honesty in their wealth management providers.

DISCUSSION

The study's implications are explored in detail in the discussion section, which compared UAS International's marketing strategies with the best practices and theoretical frameworks found in the literature review. This comparative study identifies possible areas for development as well as the advantages of UAS's existing strategy.

Comparing with theoretical frameworks, the literature review emphasizes the value of data-driven decision-making, strategic client interaction, and tailored services in wealth management (Smith, 2019; Johnson et al., 2020). These theoretical frameworks are well-aligned with UAS's emphasis on customized customer interactions, which demonstrates a thorough comprehension of client wants and preferences. The business complies with current industry best practices by using data-driven insights to guide investment plans and marketing initiatives (Lee & Shin, 2019).

Implications for Marketing Mix Optimization, UAS might improve its digital marketing initiatives in order to better optimize its marketing mix. Even while the existing approach successfully combines thought leadership with individualized client contacts, using more digital channels might expand their audience and increase engagement. UAS may reach a wider audience by utilizing social media, content marketing, and digital advertising, especially younger, proficient with technology investors who are becoming more and more significant in the wealth management industry.

Capitalizing on Emerging Trends, A number of developing trends are being observed by the wealth management sector, including the increased demand for digital financial services and the growing significance of sustainability in investing decisions. By adding sustainable investment alternatives and improving its digital service offerings, UAS may profit from these developments. The creation of mobile applications or web portals that offer customers tailored financial advice and real-time portfolio access, for instance, has the potential to greatly improve client happiness and engagement.

Addressing Potential Challenges, the competitive environment in wealth management poses a number of obstacles, such as fluctuating market conditions, alterations in regulations, and changing demands from clients. UAS must constantly analyse market trends and regulatory developments in order to be flexible and adaptive to these difficulties. Additionally, funding continuous staff training and development helps guarantee that UAS's team always has the most up-to-date information and abilities to successfully handle these difficulties.

CONCLUSION

The thorough analysis of UAS International Group of Companies, in conclusion, demonstrates a clever and successful marketing approach that combines thought leadership, data-driven insights, and individualized client interactions to successfully negotiate the competitive wealth management market. Since its founding in 2013, UAS—which serves a wide range of customers including high-net-worth individuals, institutional investors, and corporate entities—has effectively evolved from a human resources development firm to a significant force in the wealth management sector. The firm may implement advanced financial strategies and offer a variety of investment options to its clients by strategically utilizing an exclusive network of top-tier commercial banks and government agencies. UAS has a distinctively customer-centric marketing strategy that places a strong emphasis on building trust by open communication, ongoing client education, and thorough financial planning. High levels of client satisfaction and loyalty are ensured by this dedication to providing individualized service, which builds long-term client connections. By using data analytics into their investing and marketing strategies, UAS is able to provide clients with more trust in their services by providing timely and well-researched recommendations. According to the report, UAS's marketing strategies are in accordance with industry best practices, especially when it comes to utilizing digital channels to increase their reach and engagement—a critical component in luring in younger, tech-savvy investors. Moreover, the focus on digital financial services and sustainable investment alternatives puts UAS in a position to benefit from new developments in the wealth management industry. The report does, however, also emphasize how important it is for UAS to continue being flexible and adaptable to changes in the industry, in regulations, and in customer expectations. Maintaining the company's competitive advantage requires ongoing investments in workforce training and development. In the final phase, UAS strategically stands out in the industry because to their distinctive value offerings, which include thorough financial planning and ethical investing methods, as well as their creative customer service strategy. In the fast-paced world of wealth management, UAS International is well-positioned to maintain its growth and keep providing outstanding value to its customers by continuously improving their marketing mix and adopting new trends and technology.

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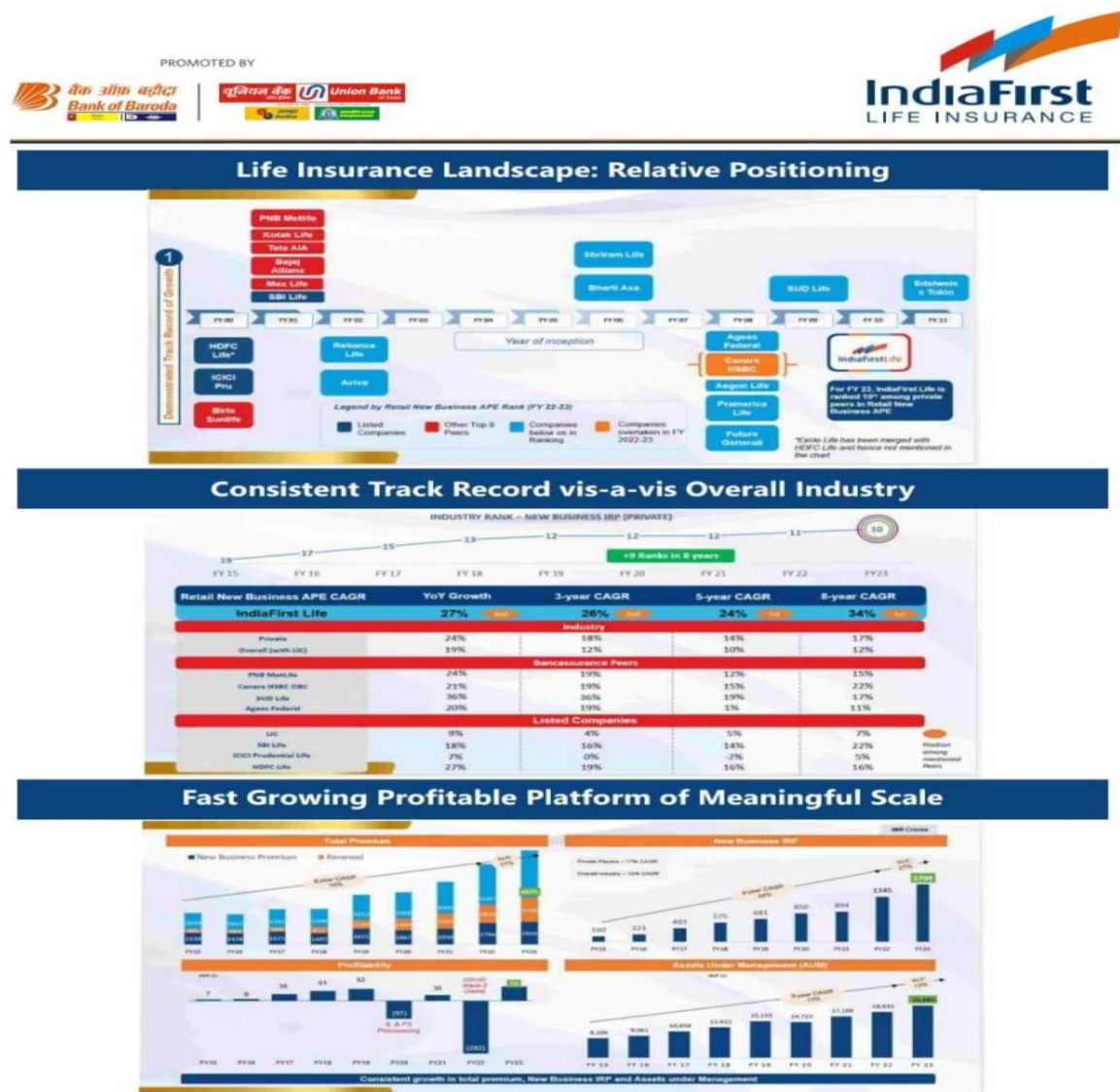
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APPENDICES

Appendix A: About UAS Product

Launched in November 2009 as the 22nd private sector entrant, **IndiaFirst Life** is a well-known player in the Indian life insurance market. Through accomplishments like INR 3,360 crore in total premiums received and an AUM of INR 14,723 crore by March 2020, it has greatly increased, ranking 12th in the private sector for Individual NB APE as of FY 2020. Legal & General sold its share to Carmel Point Investments India Private Limited, which is controlled by private equity firms managed by Warburg Pincus LLC, after the company was first established with Bank of Baroda, Andhra Bank (now Union Bank of India), and Legal & General as partners.

Appendix B: Extra Figures



Appendix C: Raw Interview Data

Interview with Senior Marketing Executive:

Q: can you describe about the primary marketing strategies that UAS uses?

A: Personalized client communication, thought leadership using content marketing, and applying data analytics to customize financial advice are our main strategies.

Q: In what ways does UAS apply data analytics to its marketing efforts?

A: To comprehend customer behaviours, preferences, and market trends, we employ data analytics. This aids in the efficient segmentation of our clientele and the provision of tailored financial advice.

Q: What influence does customer feedback have on UAS's service products?

A: Customer feedback is essential. It guarantees that our services meet the demands of our clients and aids in the improvement of our plans. To better serve you, we constantly gather and examine customer feedback.

Appendix D: Detailed Methodologies

Personalized Client Communication: UAS increases client loyalty and satisfaction by customizing communications to meet their specific needs.

Thought Leadership via Content Marketing: By providing informative materials like as white papers, UAS establishes its reputation as a thinking leader and draws in new business.

Data Analytics for Tailored advise: UAS leverages data analytics to comprehend market patterns and client behaviour in order to optimize portfolios and offer individualized financial advice.

Continuous Customer feedback: UAS places a high priority on obtaining and evaluating customer input in order to improve services and successfully satisfy changing client expectations.

Appendix E: Company Information

Brief History: Originally established in 2013 as a human resource development company, UAS International Group of Companies later became a well-known asset management organization. UAS was able to establish a strong network of strategic alliances and capitalize on its experience in the financial services industry thanks to this transition.

The mission statement and core values of UAS International Group of Companies are to address the specific financial demands of institutional investors, business organizations, and high-net-worth individuals by offering customized financial solutions. Integrity, openness, and a dedication to client pleasure are examples of core principles.

Organizational Structure: The organizational chart shows the core departments of UAS, including executive leadership, marketing, portfolio management, and client interactions. This framework guarantees compliance with strategic objectives and client-focused procedures while promoting effective operations.

Appendix F: Supporting Materials

Promotional Content and Marketing Materials: Copies of the marketing materials, brochures, and promotional content that the UAS International Group of Companies uses to tell clients about their offerings are included in this area. These papers demonstrate UAS's positioning within the wealth management market as well as its branding strategy.

Initiatives for Thought Leadership: This appendix contains published research papers, white papers, and articles written by UAS International Group of Companies. These papers, which provide insights on market trends, investment strategies, and financial planning, show off UAS's thought leadership in the field.

Digital Marketing Strategies: Screenshots or copies of digital marketing campaigns conducted by UAS International Group of Companies are displayed in this section. These resources show off how UAS interacts with its audience via social media and other digital platforms.

UAS INTERNATIONAL GROUP OF COMPANIES
Unit No-126, 1st Floor, Vipul Agarwal Mall, Sector - 26, Near M.G. Road Metro Station, Gurugram, Haryana - 122001 | E: +91-124-6285933
Trade Mark No.: 3750905
GST Reg. No.: 16GAAC11349C1ZL
CIN: 1610004H0100PT0200013

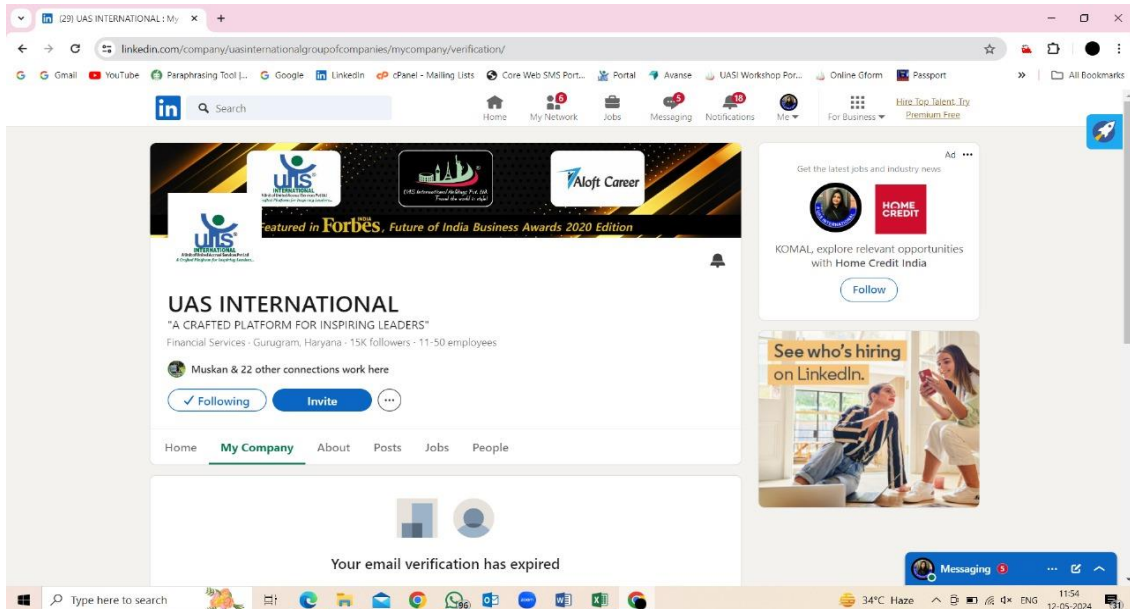
SOCIAL MEDIA TASK

	Instagram	LinkedIn	Google
BENCHMARK	60	60	60
EARLY BIRD	30	30	30
	3 Seats	3 Seats	3 Seats
APPRECIATION	80+	80+	80+
	RM Appreciation	RM Appreciation	RM Appreciation
	120+	120+	120+
	Sr. RM Appreciation	Sr. RM Appreciation	Sr. RM Appreciation
	150+	150+	150+
	AVP Appreciation	AVP Appreciation	AVP Appreciation
	200+	200+	200+
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DEADLINE 13 MAY 12:00 PM

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Rendezvous Sikkim - Memorable Ultrahand - Amazing Kerala - Blissful ...

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Our Operations Team is well equipped to cater the ...

International tour packages
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Website Directions Save Call

Service options: Online appointments - On-site services
Located in: Vatika Business Centre & Co-working Spaces
Address: mg road vipul agora mall unit No. 126, first floor, Vipul Agora mall, Sector 28, Gurugram, Haryana 122001
Hours: Closed - Opens 10 am Mon
Phone: 0124 428 5911
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WE'RE PLEASED TO ANNOUNCE:
MEMORANDUM OF UNDERSTANDING (MoU)
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