

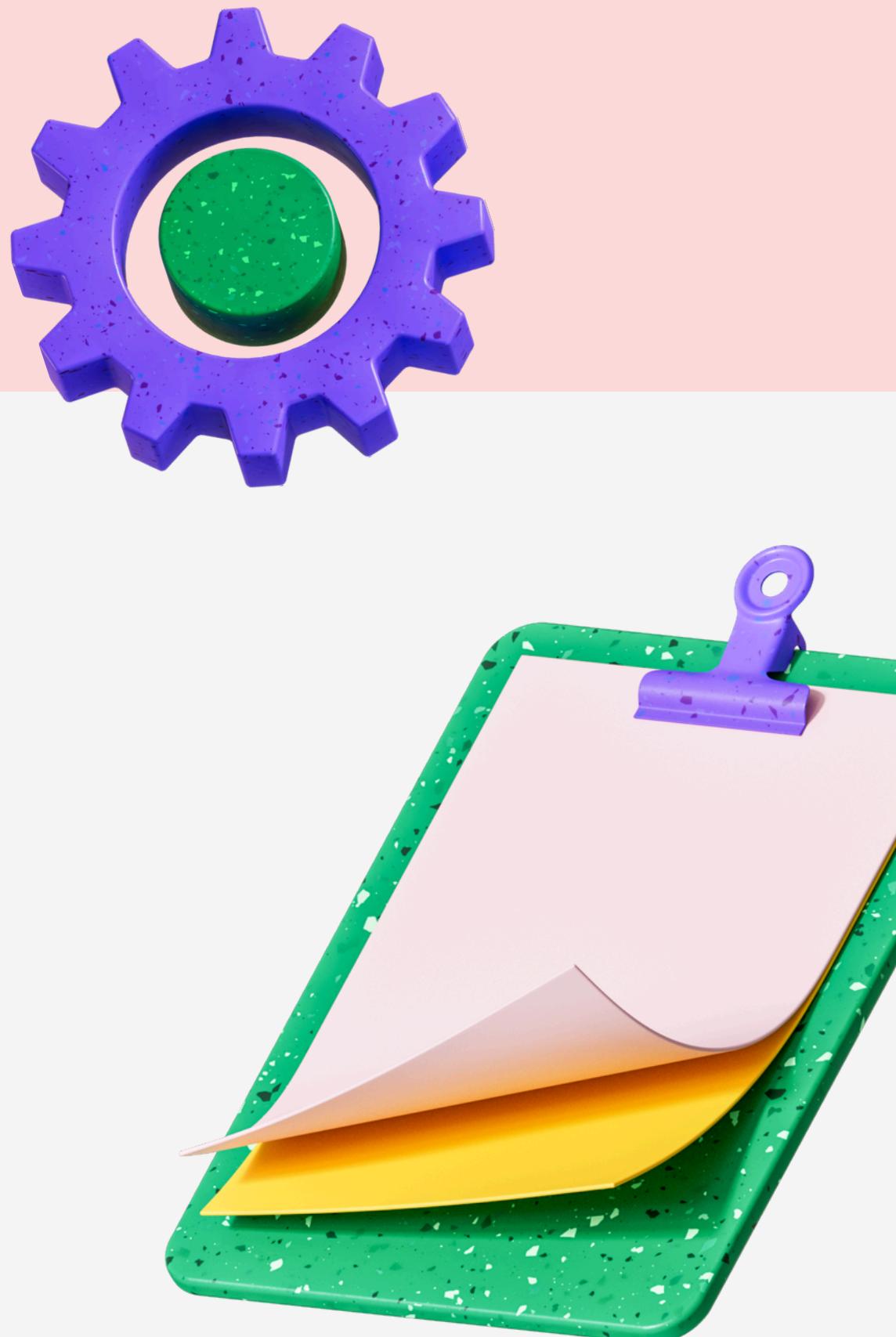


Business Case Study and Report

Presented by: Nitya Patel

Agenda

- Company Overview
- Challenges and Objectives
- SWOT
- Competitor Analysis
- Industry Analysis
- Problem Statement
- Proposed Solutions
- Recommendations



Company Overview

Portfolio Management Service (PMS) is a professional investment management service designed for high-net-worth individuals (HNWIs) and institutional investors. Unlike mutual funds, PMS offers a customized investment approach where an experienced fund manager actively manages the portfolio based on the client's financial goals and risk appetite. The PMS business under study has successfully managed investments for multiple clients, delivering superior returns over the years.

Company Statistics:

- Number of Clients: 5
- Total Investment Managed: ₹47 Lakhs
- Current Portfolio Value: ₹1.5 Crore
- Average Annual Return: 24%

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Challenges and Objectives



Challenges

- Lack of digital presence, including no website or social media engagement.
- Limited brand awareness, making it difficult to attract new investors.
- Heavy reliance on offline marketing and word-of-mouth referrals.
- Investors often prefer traditional mutual funds due to familiarity and accessibility.

Objectives

This case study aims to identify growth opportunities for the PMS business by improving digital marketing efforts and brand positioning. The primary focus is on increasing the client base and establishing a stronger presence in the investment market.

S**W****O****T**

(Strengths)	(Weaknesses)	(Opportunities)	(Threats)
<ul style="list-style-type: none">Proven track record with an average annual return of 24%, outperforming traditional investment options.	<ul style="list-style-type: none">Lack of digital presence, making it difficult to attract new clients beyond offline referrals.	<ul style="list-style-type: none">Growing demand for personalized investment solutions among high-net-worth individuals seeking higher returns than mutual funds.	<ul style="list-style-type: none">Competition from established financial institutions and mutual funds, which have strong brand recognition and trust.

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Competitor Analysis PMS vs. Mutual Funds

- **Customization:** PMS provides personalized investment strategies tailored to individual clients, whereas mutual funds follow a standardized approach for all investors.
- **Return Potential:** PMS has historically delivered an average annual return of 24%, compared to mutual funds and traditional investments that yield a maximum of 18%.

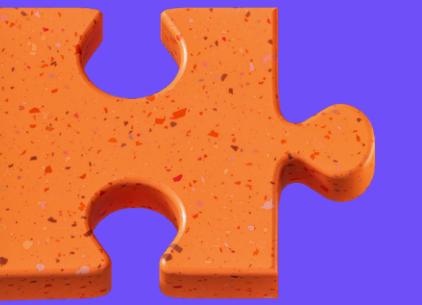
Industry Analysis

- The financial market is evolving, and investors seek personalized solutions beyond standard mutual funds.
- High-net-worth individuals are looking for investment options that offer better risk management and higher returns.
- The rise of digital platforms has made online financial services crucial for investor engagement and business growth.



Problem Statement

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Limited Client Acquisition Due to Lack of Digital Presence

The PMS business has successfully managed a select group of clients, delivering high returns. However, its growth is hindered by an outdated marketing approach that relies heavily on offline referrals and word-of-mouth. The absence of a website, social media presence, and digital marketing efforts makes it difficult to attract new investors and expand its reach. Additionally, potential clients are more familiar with mutual funds and traditional investment methods, making PMS a lesser-known option despite its superior returns. Addressing these challenges is crucial for scaling the business and increasing client acquisition.

Proposed Solutions

1. Digital Presence & Branding:

- Develop a professional website to showcase investment strategies, success stories, and client testimonials.
- Implement SEO to rank higher in search engine results for investment-related queries.
- Launch educational blogs and videos on financial planning, investment strategies, and market trends.

2. Social Media Marketing:

- Create active profiles on LinkedIn, Twitter, and Instagram to engage potential investors.
- Share investment insights, success stories, and market analysis to establish credibility.
- Run targeted ad campaigns to attract potential clients.

3. Referral & Client Testimonials:

- Encourage existing clients to provide testimonials and refer new investors.
- Offer incentives for successful referrals.

4. Partnerships & Collaborations:

- Collaborate with financial influencers to increase brand awareness.
- Partner with wealth management firms to offer co-branded services.

5. Educational Webinars & Events:

- Host webinars on investment strategies and market trends to attract potential investors.
- Conduct offline seminars in high-net-worth communities.

Recommendations

***“Targeted Advertising & Lead Generation:
Invest in paid digital marketing campaigns to
reach potential high-net-worth investors.”***

***“The business should establish a strong digital
presence through a website, SEO, and social
media marketing.”***

***“Referral programs and influencer
collaborations should be leveraged to attract
new clients.”***

***“Educational content such as blogs, videos,
and webinars should be created to build trust
and establish industry authority.”***

