



Your trusted Partner in financial growth and stability

www.shrinathjiinvestment.com

About Us

Shrinathji Investment, a registered AMFI Financial Advisory service for Mutual Funds, has been dedicated to client satisfaction for over 24 years. We offer a comprehensive range of services including Mutual Funds, Integrated Financial Planning and Insurance. Serving over 800 clients, including high-net-worth families, individuals, and retail investors, led by Pratik & Rachana Desai. Our mission is to provide independent, high-quality, and customized services to maximize wealth.

Why Choose Us

We build tailored financial investment portfolios and offer a broad selection of innovative investment options to meet your financial goals.

Pratik Desai Managing Director

Specialize in Mutual Funds & Insurance (7 times MDRT)

Rachana Desai Managing Director

Specialize in Mutual Funds & Fund Allocation Strategies

Devanshi Desai Financial Planner (AMFI CERTIFIED)

MBA in Finance & pursuing CWM (Chartered Wealth Management)

Krutarth Desai Financial Planner (AMFI CERTIFIED)

Leading Operations and IT



Our Services

MUTUAL FUNDS

LIFE INSURANCE

GENERAL INSURANCE

HEALTH INSURANCE

BONDS

EQUITY



Trusted by numerous
satisfied clients for
financial services

135+

Crores of AUM

800+

Happy Clients

24+

Years of Experience

MUTUAL FUNDS



and more..

HEALTH & GENERAL INSURANCE



LIFE INSURANCE



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