|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Logo | Our Approach | Our Services | Our Strategy | Who we are | Funds Information | Fund Protection | Contact |
|  | -Build Wealth  -Protect Investment  -Enjoy Growth  -Pass on | -Mutual Fund Management  -Institutional Portfolio Management  -Corporate Advisory  -Charitable Foundation | -Wealth Preservation and Creation  - Execution of Investment  -Asset Allocation | |  | | --- | | - [Brief on GM Equity](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.kjkgg61vdrbg)  [- Values](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.q4pkvj2v9y27)  - [Vision, Mission, Values](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.e6kktbmkjbyi) | | [- Board of Directors](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.wth907oo1r0z) | | [- Career at GM Equity](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.qcv21xsz1wqs) | | |  | | --- | | [Landing page content:](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.6h3mcyfr7220)  [- Brief Details about Funds](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.l3losey0cpiv) | | [- Summary of NAVs](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.syso23gqo1tm) | | -How is our investment protected?  -How is the risk managed | [Contact Details](https://docs.google.com/document/d/1kDOvOMnDuZOb8Cwpzsj6DPlFgH2wRmQXGhkbEzAjHy0/edit#bookmark=id.bn2lntqhm1sj) |
|  |  |  |  |  | Page under ‘Funds’ sub menu  GM Equity 1st Mutual Fund (Page contents)  -Fund Highlights  -Fund Documents  -Weekly NAV, NAV History  -Reports (Financials, Portfolio) |  |  |
|  | Bottom of the page | -News and Events  -Gallery  -Contact  -Social Media buttons |  |  |  |  |  |

**OUR APPROACH**

**Build Wealth**

GM Equity will help you grow your savings, whatever your goals.

Nothing stands still in life and wealth is no exception. Helping you grow your savings is an important part of what we do. Our skill is in helping you to understand your choices, and then helping you to make the investment decisions that are right for you. That depends on your life priorities, your goals and your attitude to risk – do you want to take a conservative path or are you comfortable with more risk?

[Contact us](https://bluewealthcapital.com/contact/) for more information on how we can help you build your wealth and assets, whatever your goals.

**Protect Investment**

GM Equity will help you protect your investment, whatever your priorities.

Helping you prepare for a changing future by protecting your investment is an important part of what we do. Any number of changing circumstances can cause your savings to diminish, some inevitable and some unpredictable. Inflation and many different types of taxes can all take their toll. We will try to help you find a balance of protection and flexibility. Protecting your savings needs to be done in a way that doesn’t cause its own problems such as barring you from access to your capital for fixed periods when you may need access to it.

[Contact us](https://bluewealthcapital.com/contact/) for more information on how we can help you protect your wealth and assets, whatever your priorities in life.

**Enjoy Growth**

GM Equity will help you enjoy your growth.

Growth creates possibilities. Helping you use your investment growth to get what you want from your life is an important part of what we do. You should be able to do what you want with your investments, whether it’s simply having more choices, having more free time, living, working or retiring abroad, or leaving a charitable legacy.

[Contact us](https://bluewealthcapital.com/contact/) for more information on how we can help you use and enjoy your wealth, whatever you choose to do with it.

**Pass on**

GM Equity will help you pass on your wealth, however you choose to.

Your wealth can have a massive impact beyond your lifetime. With foresight, you can ensure that impact is as positive as possible. Helping you plan for passing on your wealth is an important part of what we do. We have considerable expertise within GM Equity and an extensive network of contacts to help you find advice on wills, trusts, and other tax efficient ways to ensure your wealth is best structured for your beneficiaries.

[Contact us](https://bluewealthcapital.com/contact/) for more information on how we can help you pass on your wealth and assets, however and to whomever you choose to.

**OUR SERVICES**

**Mutual Fund Management**

**Mutual Fund**

Mutual fund is a capital market investment fund that has an independent legal entity. The fund collects money from investors and uses that money to invest in a portfolio consisting of IPOs, stocks, bonds, money market instruments and other kinds of permissible investments. When the fund generates profit, the return is distributed to the investors in the form of dividend and capital gain/loss. The fund is initially formed by the Sponsor, Trustee and Custodian, and it is managed by the asset management company.

{edit from brochure}

Funds under Management:

|  |
| --- |
| **GM Equity 1st Mutual Fund** |

^ {Hyperlink fund page}

**Benefits of Mutual Fund:**

**Professional Management:** Professional fund management team is dedicated to manage the fund through in-depth research, asset allocation and portfolio optimization strategies to generate profit for the investors while minimizing risk.

**Capital Gain Prospect:** Mutual fund investment has capital gain prospects, if the net asset value of fund increases over time, the investor will enjoy capital gain through encashing their investment.

**Dividend Income:** Mutual Fund can provide yearly Dividend along with Capital Gain, given the fund is generating positive return.

**Diversification:** Mutual fund managers follow each fund’s investment goal, strategy and allocations to spread investments across a wide range of companies, asset classes and industrie to diversify the risk.

**Affordability:** Investors do not need to have a lot of money to invest in mutual funds. Investors can invest according to their preferred style, they can invest periodically (monthly, quarterly, semi-annually, annually) or in lump sum according to their convenience.

**Liquidity:** Investors of open end mutual funds can en-cash their investment at the current repurchase price disclosed by the asset management company. This feature enables investors to have enough liquidity when they need cash.

**Economies of Scale:** Many mutual fund expenses are fixed costs and as the fund size grows it reduces the size of the ratio of expenses to average net assets.

**Multiple Investment Options through Mutual Funds:** Mutual Funds can invest in a variety of Asset Class and Instruments, including but not limited to capital market and money market securities.

**Government Oversight and Transparent:** Mutual fund is a completely separate legal entity and the fund is highly regulated by Bangladesh Securities and Exchange Commission (BSEC), multiple government authorized parties and government bodies to ensure upmost transparency.

**Tax Benefits:** The dividend Income of mutual fund or a unit fund is exempted from income tax of up to BDT 25,000 (Twenty Five Thousand taka). Investors are also eligible for tax rebate on their investment amount as per the tax laws.

**Risks of Mutual Fund:** There are certain levels of risks associated with a mutual fund and its underlying securities or the portfolio. The type of risk includes, but not limited to, micro-economics risks, industry risks, political risks, business risks, liquidity risks, interest rate risks and various other risks involved in the economic environment and factors affecting the securities. The Asset Management Company manages the risks by doing research on the economy, sector and securities as well as by managing an optimal portfolio allocation.

**Institutional Portfolio Management**

GM Equity offers customized portfolio management services for institutions and eligible investors. Dedicated team of fund managers will analyze an individual client’s risk profile and financial goal for the investment horizon to set specific investment objective. Then the team will provide tailor made asset allocation and invest in diverse securities and money market instruments on behalf of the client. In addition, the team can professionally turn around distressed portfolios of clients. All investments are managed by our dedicated fund managers, who are backed by our in-house equity research team. GM Equity provides maximum transparency and freedom to investors through periodic performance reports and portfolio updates as per client’s requirement.

**Corporate Advisory Services**

Our professional team is dedicated to provide customized corporate advisory services as per the requirement of our clients. Advisory Services range from helping with corporate strategies to structuring innovative financial products in the local and global arena. We understand the client’s needs and structure suitable financial product accordingly to meet their need. We can help to arrange syndicated finance for clients when they are in need of a fund or act as financial advisors on instruments regarding term-loan, syndicated loan, project and infrastructure finance, asset backed securitization et cetera. We can also assist companies in equity raise, due diligence and valuation preparation, M&A, joint venture, Pre-IPO advisory and any customized support needed by clients.

**Charitable Foundation**

We advise, manage and administer portfolios of charitable foundations to ensure the objectives are met, particularly regarding the need for income to fund the beneficial charities whilst conservatively preserving the capital base.

**OUR STRATEGY**

**Wealth Preservation and Creation Strategy**

These strategies vary depending on whether our Clients are in the wealth preservation stage or wealth creation stage. Irrespective, our priority remains to protect your wealth.

Our strategies entail the initial 3 steps for managing your money:

* Consultation with you to understand your needs and your financial and personal situation and objectives, and to analyse your tolerance for risk.
* Preparation of an Investment Proposal containing our recommendations consistent with our understanding from the consultation.
* Presentation and discussion of the Investment Proposal with you.

**Execution of investment strategies**

Once the strategic direction has been set, we execute and implement our advice which entails the next three steps:

* Establishing the necessary structures to hold your investments.
* Purchasing and/or selling Bangladeshi shares, listed and unlisted managed funds, bonds and cash as proposed in our advice.
* Ongoing reviews (at least quarterly, usually more often) which is the most crucial process to ensure that the strategy remains current with your situation, goals and needs. The portfolio is rebalanced to realign with the asset allocation parameters and changing market conditions and to take profits.

**Asset allocation strategies**

Part of our strategic advice which is core to the preservation of our clients’ wealth and management of risk is diversification across asset classes. Due to our broad capability and experience across Bangladesh, we can diversify our Clients’ wealth across the various classes of assets:

Asset classes cover:

* + Fixed income securities like bonds, convertibles and “hybrids”
  + Equities
  + Managed Funds

**Research**

We have multiple research sources available both in Bangladesh and around the globe to support our high conviction recommendations and advice to our clients. Our many counter-party relationships provide us with fresh insights. Our clients, who represent a broad spectrum, are a rich source of “on-the-ground” knowledge into the industries in which they operate.

**WHO WE ARE**

**Brief on GM Equity**

GM Equity Limited is an Asset Management Company, licensed by Bangladesh Securities and Exchange Commission (BSEC) has made a new entry in the Capital Market of Bangladesh. Our aim is to become the top class Asset Management Company in the country by providing finest quality wealth Management service to our clients.

We operate under the corporate holding of Deshbandhu Group and our purpose is to help all kinds of investors to manage their funds to maximize the return by managing the risk in a very efficient way.

**Our Vision**

Our dream is to become the most trusted and multidimensional financial advisor locally and globally.

**Our Mission**

**Provide Finest Service**

We want to provide excellent financial solutions to our clients with honesty and integrity.

**Multidimensional Financial Advisory**

We look for solving complex financial issues and bring positive transformation for our clients through innovative approaches.

**Promote Bangladesh Globally**

We aim to achieve sustainable growth of investments for local and global investors at the same time promoting the Country globally and contributing to the economic development.

**Board of Directors**A person speaking into a microphone

Description automatically generated with medium confidence

**Golam Mostafa**

**Chairman**

The company is founded by Golam Mostafa, the Chairman of Deshbandhu Group in Dhaka. Deshbandhu Group is one of the largest & most successful Conglomerates of Bangladesh, with various sectors such as sugar, food & beverage, cement, textile, ship management, shopping mall, publication, healthcare, agro & consumer goods, polymer & packaging, real estate & construction materials employing over 15,000 people.

Mr. Mostafa, an Alumni of Harvard University and Commercially Important Person (CIP) of Bangladesh, is a highly respected business leader in the business and political community.

A person in a suit and tie

Description automatically generated with medium confidence

**Sherief M.A. Rahman**

**Managing Director**

Mr. Sherief M.A. Rahman has a vast experience in investment banking and former CEO of BRAC EPL Stock Brokerage Limited which is widely recognized and highly acclaimed across Bangladesh Capital Market.

Mr. Rahman experienced a meteoric rise during his last twenty years of successful career in investment banking and broking business in both local and foreign companies.

**Career at GM Equity**

**What We Do:**

We focus on solving unique financial matters of our clients. We are passionate about enabling our clients to reach the next level of their goals. We believe in teamwork and expect the same values and thought process in every team member.

**What We Look For:**

Our people run the core functions of our business. We look for creative performers with determination and passion for the client’s success.

Opportunities at GM Equity are open for diverse background of people. Explore your potential and show us how you can make difference in achieving mission and vision of our company through innovation.

Add form:

1. Name
2. Phone
3. Email
4. Pdf upload feature [Write below of the upload button: Please add your letter of intent or cover letter alongside resume or CV. ]

**FUNDS INFORMATION**

When clicked in Funds, it goes to a single Landing page. Content of that page will be:

**- Brief about Funds**

**GM Equity 1st Mutual Fund**

Sponsor & Asset Manager:  GM Equity Limited

Trustee: Sandhani Life Insurance Ltd

Custodian: BRAC Bank Limited

Fund Type and Size: BDT 10 Crore Open End Mutual Fund

**- Summary of NAVs**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Fund Name | NAV as on | NAV Per Unit (BDT) | Investor's Buy Price (BDT) | Investor’s Sale Price (BDT) | Validity Date |
| GM Equity 1st Mutual Fund | {Date} | {XX.XX} | {XX.XX} | {XX.XX} | {Date} |

Page under 'Funds' sub menu: Funds> GM Equity 1st Mutual Fund (clickable and separate page)

**GM Equity 1st Mutual Fund**

**- Fund Highlights**

|  |  |
| --- | --- |
| Fund Name |  |
| AMC |  |
| Sponsor |  |

…...As per prospectus...

**- Fund Documents**

|  |  |
| --- | --- |
| **Document Name** | **Download/View** |
| Prospectus | {We will provide link here} |
| Form 1 |  |
| Form 2... |  |

**- Weekly NAV, NAV History**

|  |  |  |
| --- | --- | --- |
| NAV as on | NAV Per Unit (BDT) | DSEX Index |
| {Date} | {XX.XX} |  |

{Graph to be added later}

**- Reports (Financials, Portfolio)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date** | **Document Name** | **Quarter/Year** | **Download/View** |
|  |  |  | {We will provide link here} |

**FUND PROTECTION**

**How is my investment protected**

GM Equity is an asset management company. We are subject to very strict regulations that protect your money. We do not hold your money. We simply make smart investment decisions on behalf of your shareholders and are compensated via fees.

(Icon) A third party custodian (BRAC Bank) will hold the assets of our fund.

(Icon) We will file detailed semi-annual reports with the SEC, provide financial report to our shareholders and be audited by an outside firm (A Quashem & Co)

(Icon) BRAC Bank will keep our assets separate from its other accounts and can’t touch the money even if the bank fails.

(Icon) Even if GM Equity goes bankrupt, our creditors can't touch the money in the mutual fund, which will be held in a separate trust for our investors.

**In short, investing with us is as safe as putting your money in a bank but with higher returns.**

**How is the risk managed?**

Timeline

Description automatically generated

**Contact details**

GM Equity Limited

Concord Baksh Tower, 11th Floor (11-B)

Plot-11/A, Road-48, Block-CWN, Kamal Ataturk Avenue

Gulshan-2, Dhaka-1212, Bangladesh.

Tel: +88 02 47080760-64

E-mail: info@gmequity.com.bd

Web: www.gmequity.com.bd

FAX: Do we have any fax number? Not Yet

*Google map: Please insert embed code from map.*

**News & Events**

{ we will provide GM Equity related news and event details in a post. The posts will contain different images and textual contents }

**Gallery**

This page will contain different images

**Social media buttons**

Put linkedin first, then others

LinkedIn link: <https://www.linkedin.com/company/gm-equity-limited>

Facebook:

Youtube:

Twitter:

**FAQ**

Refer to this document: <https://drive.google.com/file/d/1h2BQJGFMaJxzyjQ6DpiGY8flbtRp-013/view?usp=sharing>

**Invest Online**

We will give individual investment application form for the investors here:

Example forms:

<https://www.cwtamc.com/invest-now/> (Made by [www.gravityforms.com](https://www.gravityforms.com/) )

<http://webportal.shanta-aml.com/auth/register>

<https://www.edgeamc.com/invest-now/>

**Landing Page (Front page design)**

Timeline

Description automatically generated