invest4Edu

Education Planning Made Easy!

Building Financial Growth with Trust & Strategy

INVESTMENT PROPOSAL

www.invest4edu.com

Dear Client Sir,

Greetings from invest4Edu

At the outset, we would like to thank you for giving us an opportunity to present our business proposition to you. Further to our discussion with you, I am attaching herewith a detailed investment proposal for your reference. Also sharing below a brief about INVEST VALUE, Our Parentage and Our Offerings.

About Invest4Edu

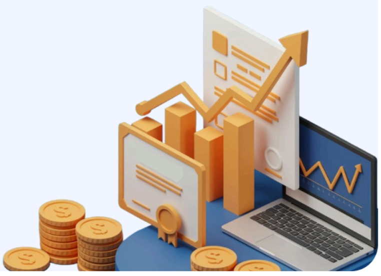
Founded with the vision to transform intellect, experience and technology into services and products for the Financial services Industry using the digital wave. We are the first certified Fintech platform in India to provide solution to all your business needs that you'll ever need to transform your effort and determination into a roaring success in terms of wealth creation, client happiness and business growth. All our offerings are based on the idea of honesty and simplicity.

We are an information technology outsourcing company. The business world is adapting to the fast-changing technological environment and we are committed to build and offer newgen comprehensive portfolio to accelerate your growth and provide sustainability to navigate through a competitive business framework. Our product and service offerings are built to harness technology and analytics.

Our Product Offering

Our product and service offerings harness the power of technology, research, analytics, and data science. Our primary goal is to address sustainability issues and overcome challenges such as user-agnostic designs, higher cost of innovation and distribution, and non-standardization of the current channels. We are a cloud-native, multi-issuer, digital platform. With a strong emphasis on scale and speed, we strive to drive transformative change and ensure a sustainable future that benefits everyone.

Equity Investments

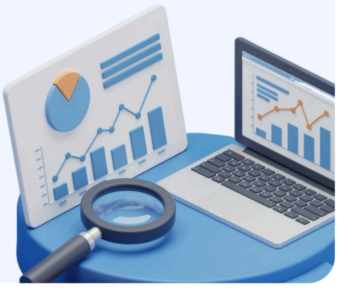


Fixed Income

Protection Solutions

Structured Products

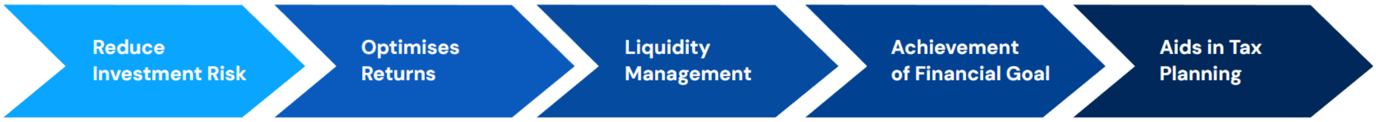
Research Services



Private Equity

Asset Allocation

Asset Allocation is a mix of different asset class eg equity, Debt, Gold etc in an investment portfolio. The aim of asset allocation is to balance risk and return in accordance with different financial goals and risk appetite of the client.



Asset Allocation

Equity: 50%   Debt: 40%

S. No.	Asset Allocation	Assets Class	Amount
1	Large Cap Funds • Large Cap Fund - ₹1,25,000	Equity	₹1,25,000
2	Mid Cap Funds • Mid Cap Fund - ₹75,000	Equity	₹75,000
3	Small Cap Funds • Small Cap Fund - ₹50,000	Equity	₹50,000
Total			**₹5,00,000**

Investment Products

1. Mutual Fund

Target: ₹5,00,000

- Focus on creating a Mutual fund portfolio with objective of long term wealth creation.
- Selection of fund which are majorly equity oriented and capable of generating Alpha in comparison with the benchmark returns.
- Investment in funds with a time horizon of 5 - 7years.
- Selection of portfolio which are managed by Fund Managers with proven track record.

Top Performing Mutual Funds

Fund Name	Category	1 Year	3 Years	5 Years
HDFC Top 100 Fund	LargeCap	8%	8%	8%
Nippon India Large cap Fund	LargeCap	8%	8%	8%

2. Portfolio Management Service (PMS)

Target: 1.00Cr

The funds endeavor to generate alpha and risk adjusted returns for the investor by investing in benchmark agnostic multi-cap portfolio with bias towards companies which classify in the mid and small market capitalization.

- The Selected Funds invest in companies where valuations are attractive and strong underlying fundamentals form high intrinsic value.
- The companies selected have a strong economic moat that helps them build a competitive advantage to not just withstand economic headwinds but also to compound their earnings over the long term.

PMS Funds

Fund Name	Category	Investment Size (INR)
Seven Island Multi Cap Fund	PMS	0.50Cr

3. Fixed Income Offering

Target: ₹2,00,000

The investment strategy is to invest across high quality Fixed Income Instruments along with structured diversified portfolio with an aim to generate periodic cash flows and capital growth.

- Focus on high credit quality instruments with majority allocation to issuers with high degree of corporate governance
- Investment strategy is to achieve diversification, targeting periodic cash flows, balancing risk and higher portfolio performance
- High quality income portfolio with dynamic investment duration to take care of market volatility

List of Debt Papers

Fund Name	Maturity	Payment Frequency	YTM	Quantum	Type	Face Value	Rating
Govt Bond Fund	28 Jan 2027(M)	Monthly	6-8%	10 Lac	Senior Secured	1,00,000	A by ICRA

4. Private Equity

Target: 1.00Cr

The investment strategy is to invest across high quality Fixed Income Instruments along with structured diversified portfolio with an aim to generate periodic cash flows and capital growth.

- The popularity of unlisted shares has grown as a result of the competition between new-age companies to reach the necessary threshold for being listed on the stock market. The majority of unlisted stocks are related to start-ups or small businesses. Evidently, small businesses have a smaller basis and hence expand more quickly than well-established businesses.
- In contrast to investing later, investing in a start-up at an early stage will benefit the investor more because it will result in greater profits and ownership holdings. Early investment in a start-up not only promises higher returns but also makes sure the investor provides guidance and decisions to the business.

Top Performing Unlisted Scrips

Unlisted Scrip Name	Industry	Investment Size (INR)
SBI AMC	Financials	0.50Cr
NSE	Financials	0.50Cr
Tata Capital	Financials	0.50Cr

Disclaimer

Investments in securities market are subject to market risks, read all the related documents carefully before investing.

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