invest4Edu

Education Planning Made Easy!

Building Financial Growth with Trust & Strategy

INVESTMENT PROPOSAL

www.invest4edu.com

Dear Vamshi 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

S. No.	Asset Allocation	Assets Class	Amount
1	Large Cap Funds • Large Cap Fund - ₹12,00,000	Equity	₹12,00,000
2	Mid Cap Funds • Mid Cap Fund - ₹9,20,000	Equity	₹9,20,000
3	Small Cap Funds • Small Cap Fund - ₹9,20,000	Equity	₹9,20,000
4	Government Bonds • Government Bonds - ₹3,20,000	Debt	₹3,20,000
5	Corporate Bonds • Corporate Bonds - ₹3,20,000	Debt	₹3,20,000
6	Fixed Deposits • Fixed Deposits - ₹4,00,000	Debt	₹4,00,000

S. No.	Asset Allocation	Assets Class	Amount
Total			**₹40,00,000**

Investment Products

1. Mutual Fund

Target: ₹40,00,000

- 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
Mid Cap Fund E	Balanced	14%	14%	14%
Small Cap Fund F	Balanced	15%	15%	15%
Sectoral Fund G	Balanced	15%	15%	15%

3. Fixed Income Offering

Target: ₹10,00,000

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
HDFC Mid-Cap Opportunities Fund Growth	28 Jan 2027(M)	Monthly	35.75%	10 Lac	Senior Secured	1,00,000	A by ICRA
Nippon India Growth Fund - Growth	28 Jan 2027(M)	Monthly	35%	10 Lac	Senior Secured	1,00,000	A by ICRA
HSBC Value Growth	28 Jan 2027(M)	Monthly	32.48%	10 Lac	Senior Secured	1,00,000	A by ICRA
Parag Parikh Flexi Cap Regular Growth	28 Jan 2027(M)	Monthly	32.77%	10 Lac	Senior Secured	1,00,000	A by ICRA
Quant Small Cap Fund Growth	28 Jan 2027(M)	Monthly	51.27%	10 Lac	Senior Secured	1,00,000	A by ICRA
AA Corporate Bonds V	28 Jan 2027(M)	Monthly	8.5-9.5%	10 Lac	Senior Secured	1,00,000	A by ICRA

4. Private Equity

Target: ₹6,00,000

The investment strategy is to invest in high-potential unlisted companies with strong growth prospects.

- 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.
- 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.

Top Performing Unlisted Scrips

Unlisted Scrip Name	Industry	Investment Size (INR)
Large Cap Stock	Financials	₹2,00,000
Mid Cap Stock	Financials	₹2,00,000
Small Cap Stock	Financials	₹2,00,000

Disclaimer

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

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