



SPECTRUM WEALTH

MANAGEMENT PRIVATE

LIMITED

SPECTRUM WEALTH MANAGEMENT PRIVATE LIMITED



SPECTRUM WEALTH MANAGEMENT PRIVATE LIMITED We got incorporated on 11th Feb'20, with an objective to understand the complex financial needs of masses by offering them customized products and services that can meet their requirements. We certainly believe that to avail our wealth management services, there is no need to be rich. We understand that the need of wealth creation is universal in nature and so we do not judge our clients on their income.

MISSION AND VISION

VISION

To become a leader in providing protection, investment and other financial solutions to make all segments of society financially strong and create significant value to all the stakeholders.

MISSION

To deliver most suitable financial solutions and superior value to our all the stakeholders - customers, shareholders, employees and society at large.

VALUES

COMMITMENT.INTTEGRITY.
TRANSPARENCY.EMPATHY

DETAILS

<u>COMPANY NAME :</u>	<u>SPECTRUM WEALTH MANAGEMENT PRIVATE LIMITED</u>
<u>DATE OF INCORPORATION:</u>	<u>11/02/2020</u>
<u>CIN NO. :</u>	<u>U65929DL2020PTC361677</u>
<u>AUTHORISED CAPITAL:</u>	1,00,000
<u>ISSUED AND PAID CAPITAL :</u>	1,00,000

REGISTERED OFFICE:

*Office no: C-91/10, I Floor Wazirpur Industrial Area
New Delhi North Delhi DL 110052*

THE DIRECTORS

PANKAJ GUPTA

*A seasoned professional and an industry veteran with over two decades of experience with a dynamic presence in the financial services sector, **PANKAJ GUPTA** is **Chief Executive Officer** at **SPECTRUM WEALTH** and a member of the Board. In his role, he is responsible for Distribution, including Proprietary Channels, Work Site, Work Site Branch and Direct sales, Institutional Sales, Business Development and Distribution Operations with Business strategy and Financial Management. He also steers strategic direction and growth of the company through his deep involvement in the strategy formulation processes and play a critical role in managing Employee Relations and Communications.*

THE DIRECTORS

RICHA VARSHNEY:

Richa is a postgraduate who has used her resourcefulness and creativity to create success. With a passion to work hard and it is this attribute of Richa has helped company grow leaps and bounds. Richa contributes to the success of the company with her insight on key business levers and understanding of all business dynamics.

OUR PRODUCT AND SERVICES

Our products and services includes Mutaul Funds, Fixed Deposits, RD, other Investment and Loans. We have a vast team of industry experts who provides effective solutions on the basis of customer requirements and our target audience would primarily be salaried employees from rural background.

As Stated playing a role of financial Intermediary, we will fill the gap between the clients and corporates for investments and financing the funds both in a single window like PAISA LO OR PAISA DO which means if you have money for investment we will provide the expertise knowledge about the investment portfolios based on the best market options available and help you to invest in it, and if you require money for your financial fulfillment for any reason then we will help you to provide at minimum support rate that fits your budget, subject to credit score you are carrying.



REVENUE GENERATION

We generate our revenues by taking certain percentage of assets we manages and services we provide to our clients either directly or indirectly in the form of commission, fees, and brokerage.

We work as an Intermediary and we will deal in variety of products such as Mutual funds, Corporate fixed deposits, credit cards, loans, portfolio management, financial planning and wealth management, Insurance.

Alone MF Industry's AUM has grown from ₹ 16.50 trillion as on November 30, 2016 to ₹37.34 trillion as on November 30, 2021, more than 2 fold increase in a span of 5 years

Investments are steadily making an entry into the household savings with an increased financial planning awareness and increased efforts to promote mutual funds as an investment product, investments are steadily making their way into household savings. Furthermore, the availability of a diverse range of mutual fund schemes makes it easier for you to select the mutual fund scheme that best meets your financial objectives. Furthermore, as everything becomes more expensive, your investment in traditional instruments may fall short of your expectations. This is where mutual fund investments can come in handy. Whatever your objectives are, mutual funds can help you achieve them.

THANK YOU!

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