



CONCEPT

INVESTWELL

— CREATION OF WEALTH —

A VENTURE OF **CONCEPT**
YOUR MANTRA FOR VALUE CREATION

INVESTMENT
IS THE LADDER TO
SECURE FUTURE

EARN
SAVE
INVEST
GROW

CONCEPT INVESTWELL PRIVATE LIMITED

WE ARE **MANAGING**



INTRODUCTION

We are one boutique investment services company. Established in 1995, we have grown horizontally and vertically. We offer investment services for Portfolio Management Service (PMS), Mutual Fund, Debt and Investment Advisory that suits to HNI/UHNI.



CONCEPT WEALTH PLUS

PORTFOLIO MANAGEMENT SERVICE

www.conceptinvestwell.com

WHY PMS?

Portfolio management service is a customized wealth management service that suits with the specific objective of **High net worth investor (HNI)**. All the aspects of making and monitoring investment right from evaluation of options, stock, picking, order execution, settlement and performance monitoring and reporting are taken care by our value addition team.

The investment is done as per the objective of the scheme under overall guidance of the investment committee. fund manager has ultimate control all the investment decisions.

WHY PMS THROUGH CONCEPT

Investing is a full time activity that entails timely flow of information, and requires thorough understanding and sharp execution skills. it's quite natural to grow one's money, but the process for achieving this simple goal is actually rather intricate, and requires experience and expertise. preserving and growing capital is as difficult as earning it.



**Dedicated Relationship
Manager And
Centralized Team**



**Professional
Management Of
Your Existing Portfolio**



**24 X 7 Access To
Your Portfolio
On The Web**



**Customize
Portfolio As
Per Objective**



**Transparent
Free
Structure**

INVESTMENT PHILOSOPHY

External Opportunity

It Should Be Huge

Business

Moat/ Competitive Advantages
Growth & Scalability
Robust Financial Track Record

Management

Integrity and Passion
Competence

Valuation

Growth at reasonable price

Process/System Driven

In Fund Management

We have definite process to evaluate companies on above parameters, we follow this process diligently in stocks selection and allocation.

HOW WE MANAGE MODEL PORTFOLIO?

- 1 Portfolio of Around 20-22 scrips.
- 2 Diversify across 8-10 sectors.
- 3 Maximum weightage of 40% in single sector.
- 4 Maximum weightage of 10% in individual script.
- 5 Average holding of a scrip is 5 years.



USP OF OUR FUND

- ▶ **Low Churning Ratio**
- ▶ **Not Timing The Market**
- ▶ **Long Term Orientation**
- ▶ **Fundamentally Driven And Not Price Driven**
- ▶ **Staying With The Winners And Selling The Losers**
- ▶ **Skin in the game**
- ▶ **Liquid Portfolio**
- ▶ **Highest level of Integrity**

We have **Qualified and Competent Team of Research Analysts** to work on above parameters.

OUR PMS PLANS



Concept Legend
(Large - Cap Equity)



Concept Dynamic
(Based on Artificial intelligence Inputs)



Concept Marvel
(Mid - Cap Equity)



SIDDHARTH MANDALAYWALA

FUND MANAGER, CONCEPT

- **Well versed and Passionate Fund Manager.**
- **Long Term Track Record of 11 Years.**
- **Deep Study & Insight in the Stock & Process of Fund Management.**
- **Fully Committed.**

INTRODUCING INVESTMENT GALA

Investment gala is place where investors will get investment knowledge and update through Blogs, Podcast, Webinar, Seminar, Reports and video channels. Out aim is to present through understanding for investment topics, company and industry analysis and latest investment products. You can select your way medium from it like Audio, video or written information.



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RANGE OF SERVICE

PORTFOLIO
MANAGEMENT
SERVICE

STRUCTURED
PRODUCT

INVESTMENT
ADVISORY

ALTERNATE
INVESTMENT
FUND (AIF)

MUTUAL FUND

DEBT/ FD

NCD/ BOND

“THE SINGLE GREATEST EDGE
AN INVESTOR CAN HAVE,
IS A LONG- TERM ORIENTATION”

CORPORATE OFFICE

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