



Ekam Wealth is a wealth management firm that believes in providing bespoke solutions for the financial needs and aspirations of our select clientele.

We pride ourselves on consistently providing comprehensive, end-to-end solutions to meet the financial aspirations of our loyal and growing customers. Whether investing for growth, managing inheritance, succession planning or retirement planning, our investment approach is simple – **minimize risk & maximize portfolio returns** .

We ensure institution-level insights, quality and due diligence processes and have curated exclusive products that are available to a select clientele with products that are available to investors that are looking for value added financial services.



Arindam Chanda
Founder and CEO

Postgraduate in Business Administration with over 23 years of experience in financial markets.

Ex-CEO of IIFL Securities, where he has spent over a decade. Led one of the largest teams in the, awarded best company by Industry bodies on multiple occasions.

Nine years with Kotak Securities Ltd. as Sr. Vice President heading large no of important portfolios.

Worked with Philips India and Voltas Ltd in early part of career.



Gopinath Prakasam
Founder and Executive Director

His last job was with Deutsche Equities as Director and Head of Sales and Trading for 11 years.

Institutional Equities Sales and Trading for 25 years.

Prior to Deutsche, he had worked at Citigroup, Kotak Securities, Dresdner Kleinwort Benson and Anush Shares and Securities.



Gulshan Taneja
Founder and Director

More than 20 years of industry experience across Transaction Banking, Global Markets and Corporate Finance at Citibank NA, Deutsche Bank AG, and Bunge Limited.

Previously at Deutsche Bank was as Managing Director – Capital Markets & Treasury Solutions.



Supratim Basu
Head Investment Strategy.

More than 25 years of experience in markets and a global insight in all his analysis.

He has tracked Indian, US and European markets- he worked with both sell side & buy side global and Indian institutions, in both public and private markets.

As part of his investment management role in the past, he has served on the boards of both publicly listed and private companies.

EKAM Wealth

Domestic Wealth Management

Family Office Services

Lending and structuring Services*

Online Platforms & Transactions

Research Collaborations with Industry Leaders

Exclusive Offshore Investments Products

EKAM Advisors

Strategic and Corporate Finance Advisory

Private Equity and M&A

Debt Capital Markets

FX and Trade Finance

Structured Finance

*through EKAM Advisors

Client Centricity

- Offer cutting edge advice keeping overall client objectives in mind, not a product push approach.
- Focus on the aspirations of the client - the EKAM approach will be to serve Indian families across their financial life.

Technology

- EKAM is building a digital platform which will generate strong portfolio analytics and consistent, high-quality advice.
- Customer analytics, reporting and servicing through technology.

High Quality Team

- Highly Experienced team of relationship managers who understand customer requirements and have experience in managing portfolios across market cycles and a wide variety of products.
- Team committed to building long term engagement with clients.

End to End Product Suite

- Open Architecture, select right investment manager for investment products.
- Self-manufactured actively managed products.
- Access to high-quality third-party manufacturers.
- Fixed income expertise and ability to create innovative structured products / MLDs.

Industry Overview

By 2024, the total individual wealth in India is estimated to cross INR 800 Lac Cr from the 2019 level of INR 430 Lac Cr in 2019, growing at a CAGR of 13.19% .

The allocation to Financial Assets is estimated to double to INR 530 Lac Cr in 2024 from INR 260 Lac Cr in 2019.

Over 2019-2024 the total no. of HNIs is expected to cross 500,000 (CAGR of 73%). During the same period, the no. of UHNIs will cross 10,000.

Clients preference for Wealth Managers over Banks

Banks have limited focus on innovation, limited product offering with a mutual fund/ insurance focus (restrictive offering due to banking regulations).

Many of the existing wealth management companies are either inordinately product focused or relationship focus depending on the management of the company.

Ekam wealth aims to focus on recommendation and products based purely on fundamental research and insights.

Founders and Senior Relationship Managers team have a track record of more than 15 years in the industry.

Investment Products

Value Added Services

Equity

Portfolio Management
Mutual Funds
Equity Alternative Funds (AIFs)

Fixed Income

Mutual Funds
High Yield Debt Funds
Corporate Fixed Deposits
Direct Bonds & Debentures

Alternates

Private Equity
Structured Credit
Quant Strategies
Real Estate Funds
Structured Products
Long/Short Funds

Financing Solutions
Estate Planning
Investment Banking

Name of Client	Amount Placed (Rs. Crore)
Altico Capital India Pvt Ltd	1030.00
Shriram Transport Finance Company Limited	5044.00
Indostar Capital Finance Limited	275.00
ECL Finance Limited	50.00
Magma Fincorp Limited	200.00
Aspire Home Finance Corporation Limited	300.00
Carnival Techno Park Pvt. Ltd.	450.00
DMI Finance Limited	100.00
Northern Arc Capital Limited	200.00
Piramal Enterprises Limited	425.00
Sterling & Wilson Pvt Ltd	100.00
Funding and working capital for Banking Subsidy	150.00
Unicorn startup delivered termsheets and funds raised	250.00
Series B Private Equity with Large Sovereign PE Fund.	250.00
Securitized receivables (Gold Loan) of India Infoline Finance	500.00
Securitization for specific asset pool of Shriram City Union	350.00
MLDs for Bombay Burmah	125.00



TEMASEK



Expertise that leads to dynamic decision making and winning strategies

GET STARTED

In a rapidly changing economic landscape, Ekam Wealth's resources are the perfect choice for your wealth creation journey.

- High Net Worth Individuals
- Family Offices
- Corporates



THANK YOU.





For more information, please visit our
website at www.ekamwealth.in

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