ARSH INVESTMENT
& Advisory Services

Arsh Investment & Advisory

Services Profile

ARSH investment is a premier Financial Planning, Investment Planning & Wealth Management Solution Provider, promoted by experienced Certified Financial Planner.

At ARSH Investment we offer personalized investment planning and Financial Planning services to Individual Investors, Non-Resident Indians (NRIs), High Net worth Individuals & Trust.

We offer a wide range of investment products such as Direct Equity, Mutual Funds, Structured Investments (ULIP), Bonds & Fixed Deposit Schemes.

Wealth Preservation

is as important as wealth creation !

Direct Equity & PMS | Mutual Funds | General Insurance & Mediclaim | Life Insurance
Structured Product (ULIP) | Retirement Planning | Income Tax Assistance

Why ARSH INVESTMENT ?

- Unbiased, research based ADVICE
- GOAL based Planning
- Strict adherence to Client's Risk Profile
- Asset Allocation is at Core of our Planning

What we Offer !!

» Wealth Strategies

» Financial Planning

» Investment Management

» Asset Prevention Strategies

» Employee Benefit Plan Implementation

» Structured Investment Planning

» Retirement Planning

» Goal Based Investment Planning

» Direct Equity, PMS, Mutual Funds & General Insurance

» Employee / Employer (Business Insurance)

» Investment with Married Woman Property Act

Our Associates

ICICI PRUDENTIAL LIFE INSURANCE

BAJAJ Allianz Jiyo Befikar

LIC भारतीय जीवन बीमा निगम LIFE INSURANCE CORPORATION OF INDIA

NJ WEALTH FINANCIAL PRODUCTS DISTRIBUTORS NETWORK

JHAVERI SECURITIES Let's Grow Together

ICICI Lombard GENERAL INSURANCE

नेशनल इन्श्योरेन्स National Insurance

What's Unique and Why Should you Choose ARSH INVESTMENT ?

It's online - purchase, track, get advisory services and more without any paperwork

Get access to multiple investment products Fixed Income, Mutual Funds, PMS, AIF, Structured Products and more...

Make investments for your family under one login ID, open minor accounts for your children and do much more

Invest for your goals with financial guidance offering Research based advice & robust functional operational support as well as technology driven seamless delivery

Get free and multi-channel (Phone, email, app, website) award-winning advisory support

What Investment options are available at ARSH INVESTMENT ?

Mutual Fund

We offer a careful selection of mutual funds, based on in-depth analysis that best represent the most appropriate routes to market for specific strategic or tactical objectives. Our analysis include firm and fund-specific factors, including consistency and risk management. We also ensure rigorous periodic monitoring to revalidate our conviction in the constituents of our selection.

Equity PMS

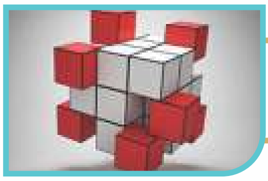
We offer equity PMS strategies and recommendations that are structured to deliver a long-term, sustainable growth in client portfolios. We focus on companies with predictable growth profiles, strong competitive positioning and top quality management coupled with solid balanced sheets, ROEs and cash flows.

Fixed Income

We monitor global macro-economic environment as well as domestic credit and monetary policy drivers to ensure that clients portfolio are positioned with the most optimal instruments to meet their return objectives for specified risk levels. We also monitor the fixed income markets for tactical trading opportunities to generate additional returns and for changing interest-rate, credit-curve and duration factors.

AIF

We recommend investments in Alternate Investment Fund. We track opportunities within this asset class of yielding secured debentures issued by entities participating in real estate sector. We also offer tactical equity based long short hedging strategies. We are extremely selective about our recommendations, which are based on a rigorous due diligence process that encompasses a number of technical evaluation criteria, combined with sound macroeconomic context-setting.



Structured Product

Our structured products team provides customized routes to market for your desired payoff profiles or hypotheses generated by you, through a judicious use of both principal-protected as well as non-principal-protected structures, across asset classes.

Insurance

We assist in safeguarding you and your family from unknown future uncertainties. We will help you plan all your Life and General Insurance requirements customized as per your profile, which indeed will aid to protect yourself as well as your belongings and assets against financial losses.

Retirement Planning

We assist in determining retirement income goals and the actions and decisions necessary to achieve those goals to help "Retire with Confidence". Retirement planning includes identifying sources of income, estimating expenses, implementing a savings program and managing assets.

3s Strategy (Save, Switch, Secure)

We at Arsh Investment believe that Wealth Preservation is as important as Wealth Creation hence we timely book profit from Equity & MF Investment and strategically switch to Structured Investment to ensure Downside Risk Protection as well Retention of Profit which helps generate Absolute Return over long term.

Glance of How We Plan & Analysis for Our Client

Cash Flow :

Cash flow is an essential tool to understand the best way of achieving your financial goals. Savings required for your goals are recommended through this report. Cash flow details summaries major streams of income and detailed break-up of expenses, to give you a holistic picture.

Goal Planning :

We plan for all your major financial goals and assist in achieving goals through various strategies at different stage of your life.

Risk Planning :

An uncertain event or incident can cause imbalance to your personal finance. Plan for all the unforeseen which involves risk.

Succession Planning :

Help you to plan for successor systematically, so that all your investments won't remain unclaimed in your absence.

Portfolio X-RAY :

Get an insight on investment with the help of technology and smart graphics which enables an individual to track his entire portfolio.

3 Years RISK/REWARD SCATTERPLOT :

Evaluate risk profile of your investment to identify which investment strategies and schemes are performing well (or poorly).

What are you waiting for ?

Sign up with ARSH Investment and enjoy the following advantages

- Free for Life Account
- Free Financial Advice
- Paperless Transactions
- 24x7 Online and Mobile Access
- Great Value added Services

ARSH INVESTMENT
& Advisory Services

Life Insurance | Mutual Funds | General Insurance
Health Insurance | Wealth Advisory

Office : 216, 2nd Floor, Manek Center, P.N.Marg, Jamnagar - 361008 (Guj) INDIA
Mobile : +91 78744 12121 | Email : info@arshinvestment.com | Web : www.arshinvestment.com