Basic

Financial Services Pvt Ltd

ABOUT US

Basic Financial Services is an **independent financial advisory** was incorporated in 1994. Our founder, Mr. Nikhil Mehta, MBA, realised the massive gap between the financial goals of a client and the knowledge needed to achieve these goals. We used this opportunity created a platform that provides financial advisory and relevant tools required in investment management.

Built on the foundation of trust and reliability, today our platform has grown to 1000+ active clients across geographies. We can proudly claim that our oldest clients still play an active part in our growth.

OUR VISION

1.

Educating and empowering our clients in making investment decisions and achieving financial goals

2.

Financial inclusion and access for all individuals and businesses irrespective of size, net worth and geographies.

3.

Foster financial freedom and independence amongst clients.

OUR MISSION

- To put our clients first in every decision we make.
- To provide unbiased, prompt and tailor made solutions
- To simplify and shorten the end to end investing process

WHY US

Experience

4 business cycles and 25 years later, we have established ourselves as experts in the industry.

Autonomy

By maintaining our autonomy we are able to provide tailored client solutions, rather than product-driven outcomes.

Lasting Relationships

We have a long standing relationship with all our clients that now extends to the second and third generations too.

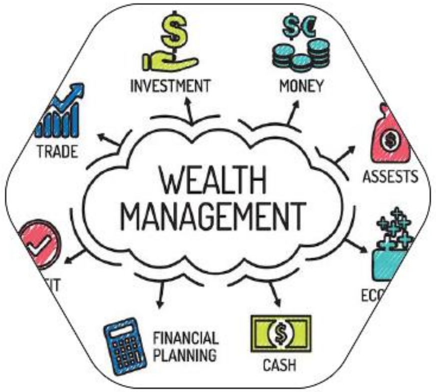
Product Basket

Having access to traditional and innovative financial instruments, we provide high quality, objective and pro-active advisory to our clients.

OUR SERVICES

INVESTMENT ADVISORY

- Analyse and allocate funds to the right mix of asset classes and construct an portfolio which is in line with your goals and objectives.
- Monitor the performance of all asset classes throughout the investment period.



INSURANCE

- Advise clients on their business and personal insurance requirements.
- Review existing insurance policies to ensure they are appropriate, cost effective and remain at appropriate levels.

FINANCIAL PLANNING

- Construct a financial plan to achieve your goals taking into account your risk & return, financial & tax constraints.
- Periodically review the plan and make changes if necessary.

WEALTH MANAGEMENT

- Assist HNIs, UHNIs, NRIs and corporates to preserve and grow capital through traditional and alternative investment options.
- Succession planning, estate planning and tax planning

FINANCIAL PLANNING

Our financial planning process involves 4 important steps

- Gathering relevant financial information
- Setting life goals
- Examining your current financial status
- Formulating a plan that meets your goals given your current and future circumstances

Why Financial Planning

- Safety Net For The Future
- Always be Prepared
- Helps Decision Making
- Optimum use of Resources
- Better Standard Of Living
- Expert Advice

INVESTMENT ADVISORY

Based on your requirements we offer an array of products:

INSURANCE

- General Insurance
- Life Insurance

EQUITY

- Direct Equity
- Mutual Fund
- PMS
- AIFs

FIXED INCOME

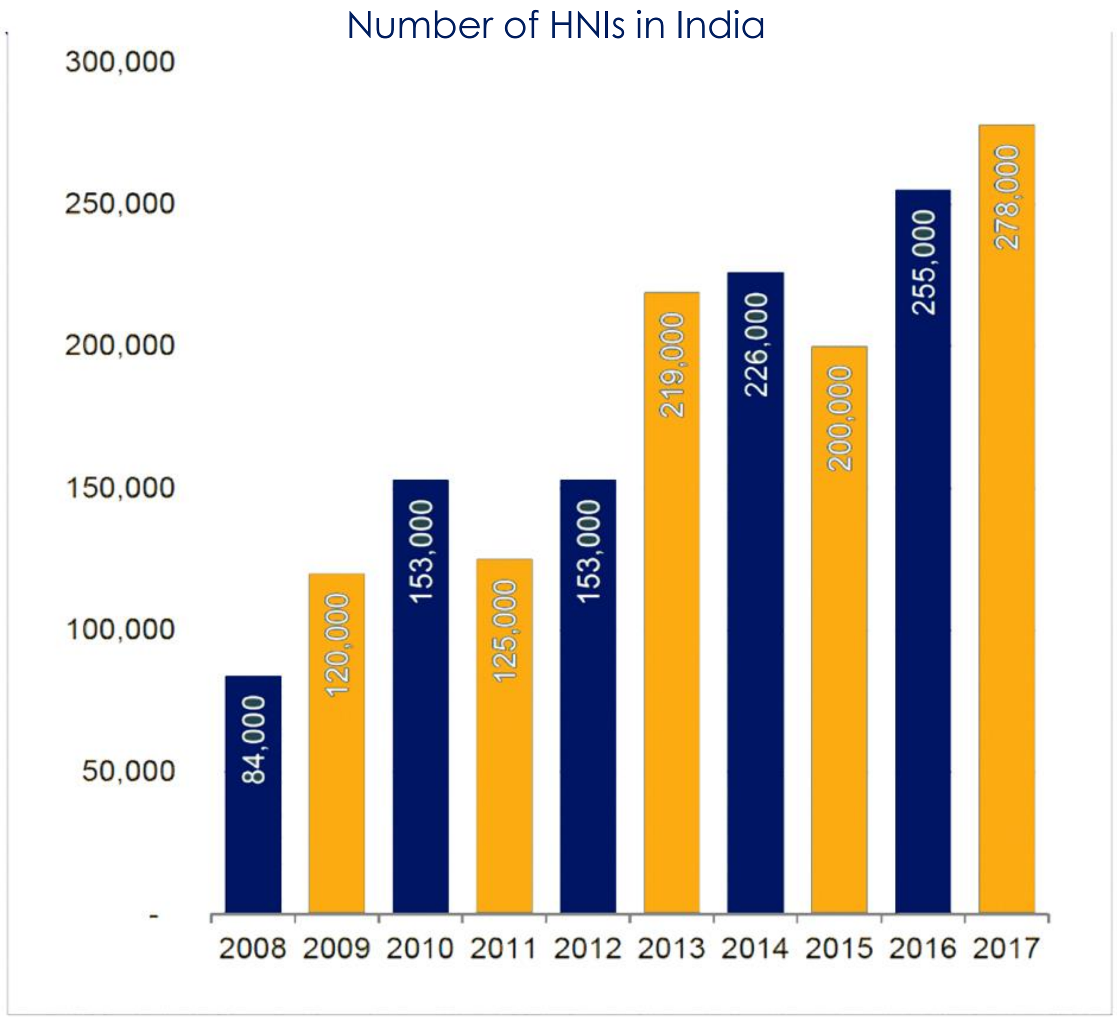
- Debt Funds
- Fixed Deposits
- Non Convertible debentures
- Fixed Maturity Plans

PRIVATE EQUITY/ VENTURE CAPITAL

- Alternate investment Funds
- Angel investing

WEALTH MANAGEMENT

- The number of HNWI's in India reached 278,000 by the end of 2017. Between 2011 and 2017, the number of HNWI's in India has seen a steady rise at a CAGR of 13.52%. BY the end of 2025, global HNWI wealth is estimated to grow to over US $100 Trillion.
- High net worth households would grow at an even faster rate till 2019 growing at a CAGR of about 21.5%.
- Advisory asset management and tax planning has one of the highest demand among wealth management services by HNWIs; this is followed by Financial Planning.



INSURANCE PLANNING

We ensure that our clients:

- Have adequate coverage through the right medium
- Do not over pay premiums
- Receive prompt action in case of occurrence of an "event"

We offer our clients:

- Life Insurance
- Mediclaim
- Property Insurance
- Auto Insurance
- Key Man Insurance
- Overseas travel Insurance
- Shop owners Insurance
- Export/Import Insurance

TIME IS NOW

ADVANTAGE INDIA

GROWING DEMAND

- Rising incomes are driving the demand for financial services across income brackets.
- Financial inclusion drive from RBI has expanded the target market to semi-urban and rural areas.
- Investment corpus in Indian Insurance sector can rise to US$ 1 Trillion by 2025

GROWING PENETRATION

- Credit, Insurance & Investment Penetration is rising in rural areas.
- The Government has launched India Post Payment's Bank (IPPB) to provide every district with one branch which will help increase rural penetration. It opened a total of 1,896,410 accounts till December 24, 2018.

INNOVATION

- India benefits from a large cross-utilization of channels to expand reach of financial services.
- As of 2018, the Financial Inclusion Lab has selected 11 Fintech innovators with an investment of US$9.5 million promoted by IIM Ahmedabad's Bharat Inclusion initiative BII along with JP Morgan, Michael & Susan Dell Foundation, and the bill of Melinda Gates Foundation

POLICY SUPPORT

- The Government has approved new banking licenses and increased the FDI limit in the insurance sector.
- Gold Monetization scheme in 2015, Atal Pension Scheme, Pradhan Mantri Suraksha Bima Yojana, Pradhan Mantri Jeevan Jyoti Bima Yojana.

POWER OF COMPOUNDING

THE POWER OF COMPOUNDING AND IMPORTANCE OF INVESTING

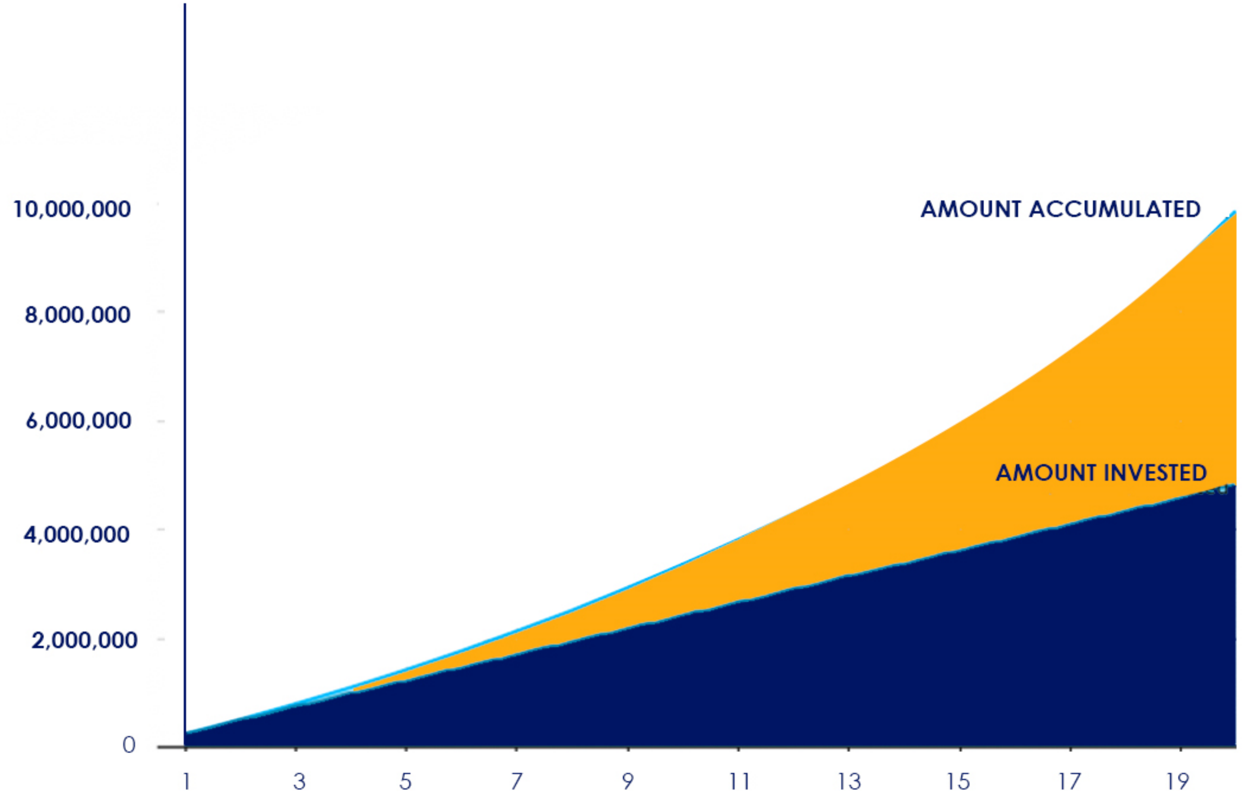
A common misconception is that financial advice is only for people with large amounts of money or nearing retirement. However developing good financial and savings habits in your earlier years of life will pay huge dividends in your future. With discipline and patience your money can work for you and make a real difference in your account balance over time.

The key is the power of compounding, the snowball effect that happens when your earnings generate even more earnings. You receive interest not only on your original investments, but also on any interest, dividends, and capital gains that accumulate —so your money can grow faster and faster as the years roll on.

POWER OF COMPOUNDING

THIS BELOW GIVEN EXAMPLE HIGHLIGHTS THE BENEFITS OF COMPOUND INVESTING

Investment Amount	INR 20,000
Frequency of Investment	Monthly
Investment Period	20 years
Expected rate of return	11% p.a
Inflation	4.5% p.a
Total Amount Invested	48,00,000
Total Amount	98,61,458



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