

NARAYAN & NARAYAN

FINANCIAL PLANNING

*Helping people take control of their
finances*



FINANCIAL PLANNING

OUR IDEOLOGY

People don't always take the actions they should and it leaves a big gap between what people want to achieve and what they actually do.

Therefore as part of overall financial wellness we help people with their Savings, Investments, Retirement plans and Financial planning.

Most of our clients are savvy enough to make their own personal trades, but that doesn't mean they've mastered the complexities of managing their finances.

Our approach helps you feel confident in investing.

We know that managing stock plans is no small task.

That's why our services combines flexible technology to help your processes run smoothly, dedicated education resources to guide you, and support from humans who know your name.

Our goal is to make your life easy.



SERVICES

ONE TIME INVESTMENT

Designed for mid-to-long term investors who are looking for a passive investment strategy.

It follows the classic Value Investing Strategy.

What: A Portfolio of 8 - 12 Stocks based on fundamental analysis of value investing

Ideal for: Mid-to-Long term investors

Features:

Minimum Investment: INR 1,50,000

Recommendation Frequency - Once (8-12 stocks)

Fee - INR 10,000

PORTFOLIO MANAGEMENT

Designed for mid-to-long term investors expecting to outperform the benchmark index by investing in large cap stocks. Clients will invest in a portfolio of 10-15 Stocks.

What: Long-term investment recommendations of 10 - 15 stocks in equity cash based on fundamental analysis

Ideal for: Long-term investors

Features:

Minimum Investment: INR 5,00,000

Recommendation Frequency - Once (10-15 stocks)

Follow Up: Monthly rebalancing

Fee - INR 10,000 quarterly

SERVICES

SWING TRADE CALLS

Designed for short-to-mid term investors expecting to take advantage of short term trading calls . Investment plans involves strategies to buy stock expected to go up in the short term

What: Swing trading recommendation with a holding of 3 - 6 months in stocks using stop loss and target

Ideal for: Short-to-Mid term investors

Features:

Minimum Investment: INR 1,50,000

Recommendation Frequency - Twice monthly

Fee - INR 20,000 quarterly

PORTFOLIO REVIEW

Our portfolio review service is an independent evaluation of the investment strategy and performance of your current investment manager after costs, and how this compares to the industry generally

What: A Portfolio Review analysing your present equity portfolio

Ideal for: All investors

Features:

Recommendation Frequency - Once

Fee - INR 10,000

SERVICES

SHORT NEWS FEED

Designed to tell the latest news in minimum words. The topics will be on the latest relevant stock market news

What: Weekly News Feed in few lines and monthly call with our financial manager

Ideal for: All investors

Features:

Frequency- Weekly news feed and Monthly call with our financial manager

Fee - INR 12,000 / year
or INR 9,000 / 6 months

Follow us at



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