



Anand Rathi

ANAND RATHI
INVESTMENT SERVICES

ABOUT THE GROUP

- The Anand Rathi group came into **existence** in year 1994.
- Mr. Anand Rathi and Mr. Pradeep Kumar Gupta laid the **foundation** of the Anand Rathi Group.
- With roots over 25 years deep, we have **carved a niche in the financial services sector**. The Anand Rathi Group offers a wide spectrum of services ranging from Investment services across Asset classes to Private Wealth, Institutional Equities, Investment Banking, Broking and NBFC.
- A **customer-first approach** coupled with digital innovation helps us contribute to the client's financial wellbeing.
- Holds **Networth of more than Rs. 2,500 cr as on date** with employee strength of more than 4,000.

GROUP PHILOSOPHY

“To be a leader in investment advisory, provide innovative financial solutions & be the first choice for clients and employees”

Vision

“We are client centric, with a clear focus on providing long-term value addition to clients, while maintaining the highest standards of excellence, ethics & professionalism”

Mission

CORE VALUES



**Family
Culture**

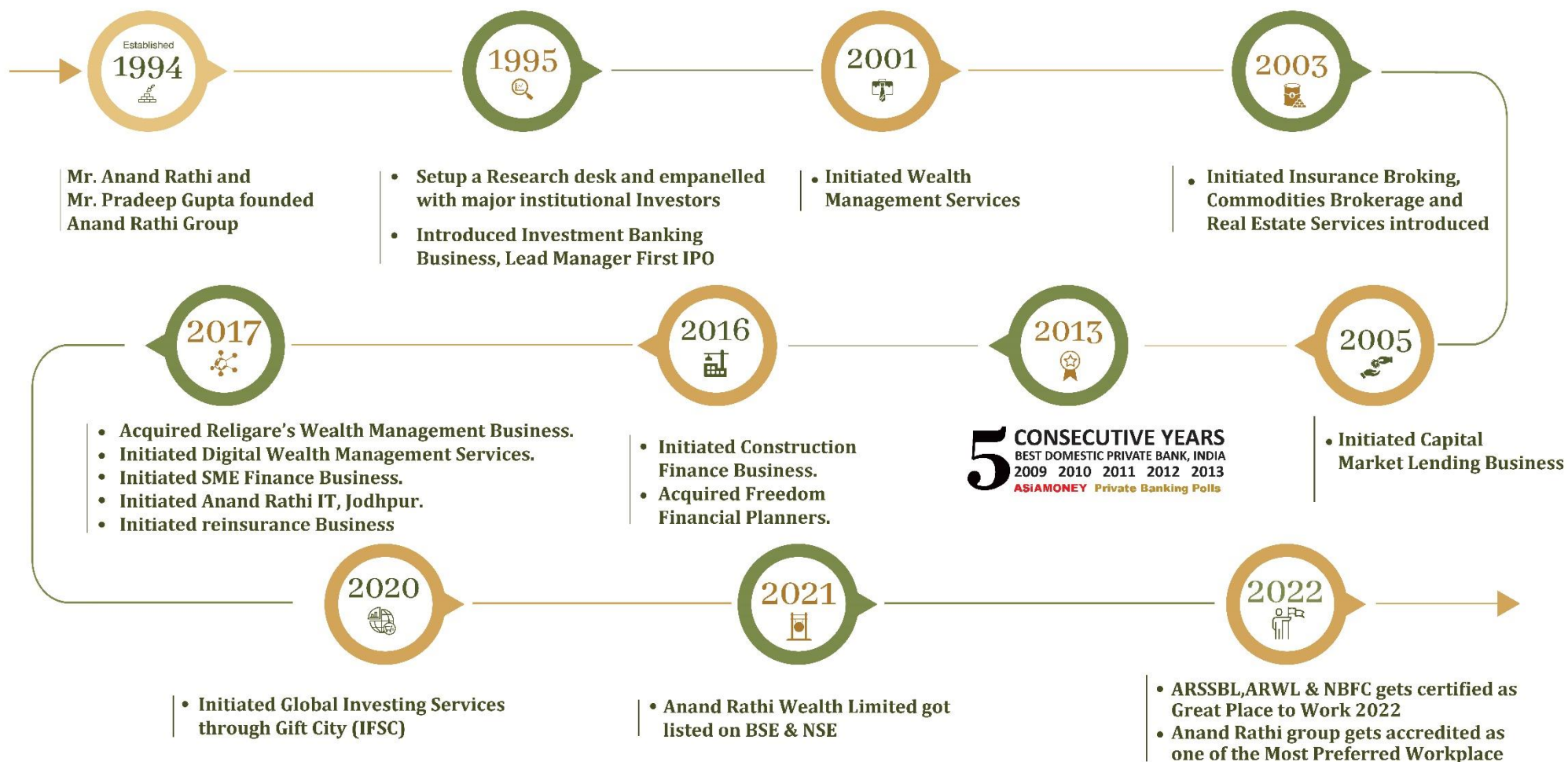


**Integrity
(Ethics)**



**Entrepreneurial
Organisation**

OUR JOURNEY





Anand Rathi

Founder & Group Chairman

- Mr Anand Rathi is **the founder and the soul** of the Anand Rathi Group.
- **Gold Medallist chartered accountant**
- **Leading financial and investment expert** in India and the broader South-East Asian region.
- In 1999, Mr Rathi was appointed the **president of BSE** (Bombay Stock Exchange).
- Rapid **expansion of BOLT - the BSE Online Trading System**, speaks high for his farsightedness.
- **Set up the Trade Guarantee Fund**
- Played a vital role in setting up the Central Depository Services (CDS).
- An esteemed member of the ICAI with **experience of 53 years** across sectors.



Pradeep Gupta

Co-Founder & Group Vice Chairman

- Mr Pradeep Gupta is the co-founder
- Started career with a family-owned textile business, stepped into the financial world with Navratan Capital & Securities Pvt. Ltd. Later on, Mr Gupta later joined hands with Mr Anand Rathi to establish the Group.
- Played a **vital role in the success of the Institutional Broking and Investment Services arms**
- Driving force behind the **strong network of franchisees and branches** across the country.

ANANDRATHI

***Anand Rathi Share & Stock
Brokers Ltd.***

ANANDRATHI
INVESTMENT SERVICES

anandrathi.com



INVESTMENT SERVICES

- We call ourselves as “Investment Services” entity
- We cater to the financial requirements of clients with a **focused** approach.
- Provide **Expert Research** in various Asset classes like Equity, Commodities, and Currency
- Offer **wide array of products** across various asset classes.
- Offer **high-tech digital apps and platforms** as well as physical touch points through which Client can Invest in desired asset class.

Astute Leadership



ROOP BHOOTRA

CEO, Investment Services

- **A rank holder Chartered Accountant and began his career with the Anand Rathi group in the year 1995.**
- He has **over 25 years of Capital Market experience** in the field of Building businesses, Creating Business Strategies, Sales, Operations, Process management, Accounting, Risk Management, and Technology upgradation.
- His core **focus includes Business expansion, People Management, Key Partnership Development, and Tactical market planning.**
- Under his spearheading leadership, the Broking & Distribution business has grown at a rapid pace



VISHAL LADDHA

CEO, Institutional Equity

- **A Chartered Accountant with 28 years of experience and began his career with Anand Rathi group in the year 1994.**
- One of the most well-known and trusted sales traders in the industry.
- His unique ability to **source and place relatively illiquid stocks at low impact cost drives** a large part of the Group's institutional equity
- Under his spearheading leadership, the IE business has grown at a rapid pace



OUR NETWORK STRENGTH

1

6.5 Lacs + Registered Customers

2

1850+ Direct Employees

3

95+ Own Branches in 57 Cities

4

Strength of 2500+ Business Associates/Partners



ARSSBL Bank Partnerships

ANAND RATHI
INVESTMENT SERVICES

ADITYA BIRLA



FINANCE



AXIS BANK



बैंक ऑफ़ बड़ौदा
Bank of Baroda



IndusInd Bank

infina



TATA CAPITAL



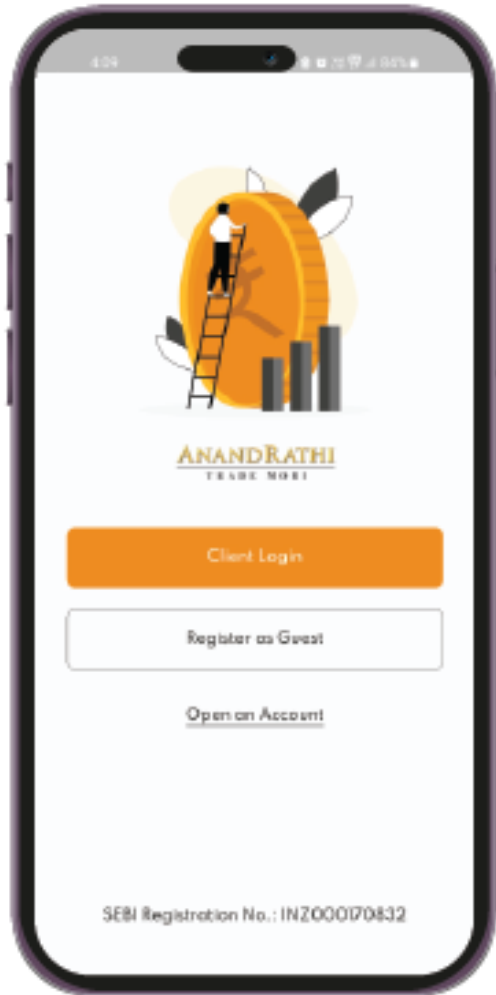
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ARSSBL Technology

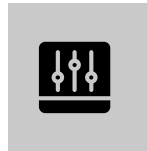
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Trading & Investing Now Made Easier



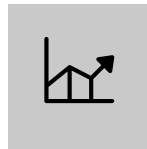
Trading Features at your Finger Tips



Comprehensive Dashboard that gives snapshot of your trading account



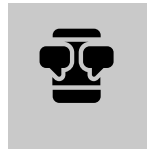
Real-time Quote, charts & analytics



Track and Manage Portfolio – Real-time



Detailed Market Information



Trading tools to take informed decisions



Easy & Secured User Interface

SEBI Registration No.: INZ00070832





Investing Features at your Finger Tips



Discover 5000+ Mutual Funds at Your Fingertips



Unlock Expert Curated Investment Baskets



Single point of Access to All Mutual fund Needs



Invest in the top performing funds based on their returns



Dynamic Investment Picks – Strategically Categorized Schemes for Investing in Lumpsum ,SIP, High Returns & ELSS.



Interactive Calculator Displayed on Screen helping to take informed decision



Our Digital Offerings

eARENA
by ANANDRATHI

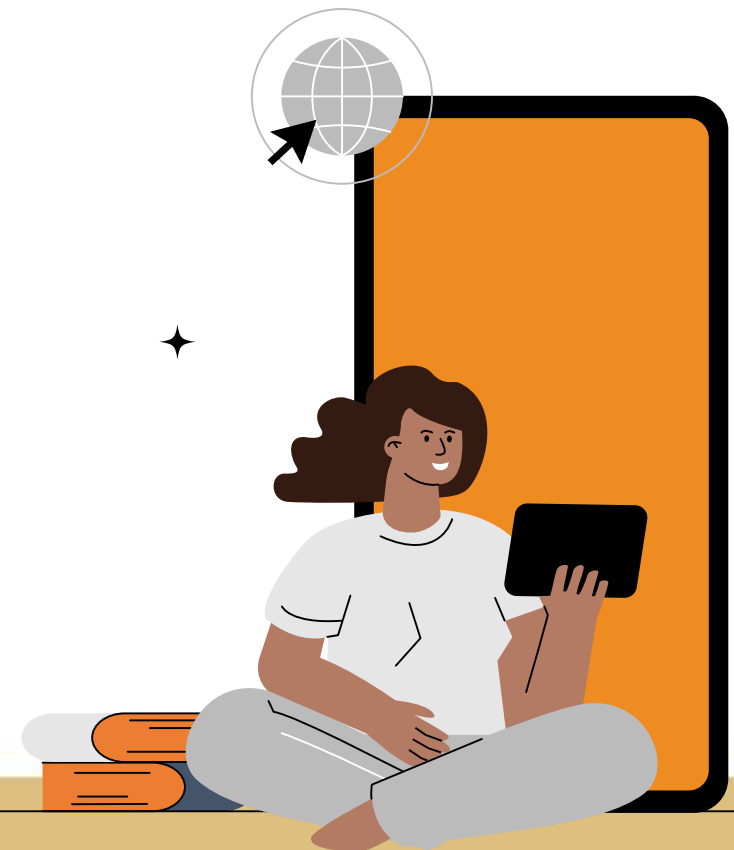
TRADeMOBI

TRADeXPRESS+

ARINVEST
Investment Simplified

MF CLIENT

ePARTNER





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Our Research

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Various Research Reports with Frequency

BTST	Buy Today Sell Tomorrow	STT	Short term Trading (3-15 days)*
ITT	Intraday* Technical Trading (Intraday)	Momentum	Short term Trading (3-10 days)*
PowerPick	5 Days* call (T+5)	T20	1 Month* timeframe
Bazar Bulletin	3 to 6 months Timeframe	Stockmovers	1-3 months* Timeframe
MTF Ideas	1 month Timeframe	Pick of month	1 month Timeframe

PRODUCTS & SERVICES



BROKING

Equity | Derivatives | Commodities | Currency/Futures | IPO | Algo Trading



DISTRIBUTION

Mutual Funds | Corporate Fixed Deposits | Structured Products |
NCD/Bonds | Portfolio Management Services



FINANCING

Margin Trading Facility



RESEARCH

Basket | Wills & Trusts | Forex



ANANDRATHI

Focused Equity Products

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Focused Equity Products

VALUE PICK 

Value Pick
ITF: 12 months

 **SPECIAL PICK**
(Techno-Funda Ideas)

Special Pick
ITF: 12 months

 **PAIR TRADE STRATEGY**

Pair Trade Strategy
ITF: 1 Months

AR
Positional 

AR Positional
ITF: 3-15 days

STOCK OPTIONS

Stock Options
ITF: 3-15 days

 **TECH EDGE**

Tech Edge
ITF: 3-6 Months

POWER PICK 

Power Pick
ITF: T+5 Days

AR INTRA DAY

AR Intra Day
ITF: Same Day

 **BAZAAR BULLETIN**

Bazaar Bulletin
ITF: 3 months

STOCK MOVERS 

Stock Movers
ITF: 1-3 Months

Emerging Picks 

Emerging Picks
ITF – 3 Months

INVESTMENT
baskets

Investment Baskets
Short/Medium/Long term



Investment Baskets

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Investment Baskets

Investment Baskets are a Portfolio of Stocks with the blend of the Thematic Equities. Each basket differs in its Goals. Basket is curated using efficient strategies and in-depth analysis.

Types of Investment Baskets?



Technical baskets are momentum & theme based investment baskets with medium to short term Investment horizon.



Fundamental basket are theme based investment baskets with medium to long term investment horizon.

Features of our Investment Baskets



Power Of Discretion



No Lock-in period



Single click to invest



Dynamic
Research Based
Stock Allocation



Periodic Review



Live
Performance
tracking

Our Top 10 Baskets

1

Umang Utsav

2

Miles Ahead

3

Samasya Ka Samadhan

4

Route to Recovery

5

Shubharambh

6

Connecting India

7

Consumption Carnival

8

Unsung Heroes

9

Earnings Beat

10

Small Pack Big Impact

and many more...

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Fixed Income Instruments

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Fixed Income Instruments*

A fixed-income instrument is a debt instrument issued by a government, corporation etc. to finance & expand their operations through fixed periodic payments and eventual return of principal at maturity.

Key Benefits



**Lower risk
v/s Equity**



**Lower volatility
v/s Equity**



**Stable
Return**



**Capital
Protection**



**Diversification across
asset classes**

Fixed Income Instruments **We offer**



**Corporate
Fixed Deposits**



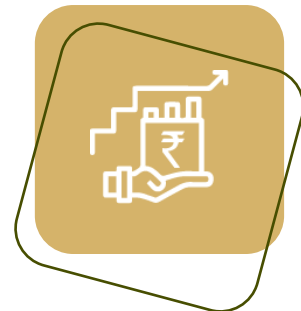
**Market Linked
Debentures**



**Debt
Mutual Funds**



**Debt Alternative
Investment Funds**



**Tax Free
Bonds**



**Corporate
Bonds**



**Capital
Gain Bonds**



**Sovereign Gold
Bonds**

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Portfolio Management Services

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Portfolio Management Services

PMS is a financial service provided to the clients by the fund manager where the fund manager designs a product that caters to the investment objectives and needs of the clients.

Key Benefits



Dedicated RM to advise and guide you



Periodic updates to review your investment portfolio



Diversified strategy to churn out maximum yield from your investments



Easy access to fund manager

Our Offerings



Third Party Offerings



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Mutual Funds

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Mutual Funds*

Mutual Fund is an investment pool wherein money is collected from various investors to make a pooled investment in various asset classes like equity stocks, bonds, money etc.

Types of Mutual Funds



Debt Mutual Fund



Hybrid Mutual Fund



Equity Mutual Funds

Ways of Investing in Mutual Funds

Systematic Investment Plan (SIP)

A systematic investment plan allows the investor to invest a fixed amount in the selected Mutual Fund periodically, usually monthly on a specific date selected as per their convenience.

Key Benefits



Rupee Cost Averaging



Convenience & Discipline



Power of Compounding

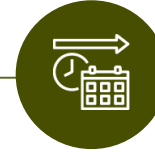


Low Initial Investment

Lumpsum Investment

This is a method of investment in which you invest a single sum of money in a Mutual Fund in one go.

Key Benefits



Beneficial for Long Term



Market Timing

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Funding Services

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Our Offerings

Margin Trading Facility (MTF)

Margin trading is a facility under which investor is allowed to buy stocks by paying a marginal amount of the actual value of shares. This margin can be paid either in cash or in shares as security.



Increases Investment Capacity



Additional Exposure on Investment



Easy Online Activation



Optimum Interest is Charged



Enjoy Dividends and other benefits

Securities Lending & Borrowing Mechanism

Securities Lending and Borrowing Mechanism (SLBM) is a way through which investors can borrow or lend shares to other market participants.



Additional Income



No Counter Party Risk



No Physical Settlement



Enables Short Sell



Algozy

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Algozy

The Future of Trading

Algozy is a robust API (Application Programming Interface) that assists you to build trading systems & strategies easily and smartly. Our Algozy API gives you free access to live Market data, Orders, Real-time execution with few lines of code.

Key Benefits



Simple API integration process



Connect any front-end application



Integrate with third-party tools



Algozy APIs are free of cost

Algo Front-End Applications



TRADETRON
ALGO STRATEGY MARKETPLACE

TRADETRON is a web-based Algo strategy marketplace and there are 1000+ pre-define strategies with back-tested data analysis available for a client which they can deploy & execute in live market and users can build their own Algo strategies with few line of codes



GREEKSOFT
TRADE FAST . TRADE SMART

Greeksoft Application is a market leader in Automated Trading Software & Risk Management Industry. The Application provides trading platform equipped with in-built intelligence and low latency. Besides Front end execution trading solutions, they also specialize in risk management tools that help to get insights on trading risks in exchange-traded derivative instruments.



TOXXO

STOXXO will act as an advanced bridging application between the execution platform & API. It will also help to execute the strategies through Trading view, AmiBroker, Ninja Trader, MT4, etc.



FOX
TRADER

FOXTRADER is a new trading platform with advanced charting & trading strategy development on manual and automated trading. In the Fox Trader application, there are 450+ study indicators, 15+ signal scanners, and predefined ready strategies are available.



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Commodities

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Commodities

Commodity derivatives are investment tools that allow investors to profit from certain commodities without possessing them. The buyer of a derivatives contract buys the right to exchange a commodity for a certain price at a future date. The buyer may be buying or selling the commodity.

Advantages of Investing in Commodities



Lower Margin

The margin can be close to 5-10% of the total value of the contract. This is much lower than the margin required for other asset classes.



Liquidity

It is easy to buy and sell commodity futures. An investor can liquidate his position whenever required.



High Returns

The investors can take larger positions while investing lesser amounts of capital. This also helps increase the potential for higher profits.



Protection against inflation

The demand for goods and services rise. It leads to an increase in the price of the goods and services as the cost of the raw materials i.e. commodity increases



Diversification

Commodities have negative or low correlation with stocks. Due to this negative correlation, where an increase in commodity prices drives down stock prices, the losses incurred by stocks can be adjusted against the gains made by commodities derivatives.



Currencies

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Currencies

Currency derivatives are contracts that derive their value from their underlying asset, the currency. Currency derivatives help protect against price volatility of the underlying asset in the future and are widely used by traders as a risk management financial instrument.

Benefits of Currency Derivatives



Hedging

Hedging is a risk management instrument against any undesirable fluctuations in currency rates in the future



Highly Liquid

The most liquid market in the world is said to be the foreign exchange market. This is due to the availability of numerous traders and buyers.



No Manipulation

Due to the giant size of the market and numerous players involved, it's impossible to manipulate the market.



Fixed Lot Size

A lot size means the number of currency units per lot. The biggest advantage to this is that traders who participate in these contracts can trade multiple lots per contract.



Low Margin

You can just pay 2-3% of the value while trading currency derivatives instead at the full traced value. The percentage value is called the margin amount.

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Premium Subscription Services

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Value Added Scheme (VAS)

VAS is a new and innovative scheme that is a win-win for us as well as clients. We win because we get fixed brokerage as subscription and clients win as they benefit from lower brokerage.



Exclusive access to
our Telegram
Channel



Exclusive Call &
Trade Facility



Exclusive access to
every Research report
that we publish



Free One time Portfolio
Evaluation Service



Stock Lab

Stock Lab is a subscription-based comprehensive evaluation and analysis tool that helps you evaluate your current holdings and highlights the nonperforming stocks in your portfolio.

Periodic Review



Seamless Execution



ADVANTAGES



Helps you eliminate
poor performing stocks



Extensive Analysis

RIA Baskets (External Advisory)



Abakkus is an alpha focused boutique asset manager managing roughly INR 10,000 crores* in long only strategies for Indian equities.

The logo for Narnolia features the word "Narnolia" in a bold, red, sans-serif font, with a registered trademark symbol (®) to the upper right of the letter 'a'.

Narnolia[®]

In order to achieve superior risk-adjusted returns over a long period, Narnolia adheres to the "growth in value" investment philosophy.

AWARDS & ACCOLADES



**Most trusted
BFSI Brand
2023-2024**

Anand Rathi Group
Wins the trusted BFSI
Brand



**Great Place
to Work
2023-24**

Great Place to Work
Institute (India)



**Our Rap Wins
Special Mention**

In creative campaign
category at Social Stars
Awards Held By Inkspell
2022



**Anand Rathi Advisors
Ltd.
Best Equity
Advisor**

ET Now World BFSI
Congress Awards'20



**Finnoviti
award 2022
for 'Kagaz'**

Digital initiative for
Investor Education



**BTX
Enterprise
Awards 2021**

Financial Services and
Banking category



**The Great Indian
Digital Marketing
Campaign of the Year**

Kitne Mein Diya
Campaign at The Great
Indian Marketing Awards
2021



**Best Video
Marketing
Campaign (Special
Mention) Award**

World BFSI Congress
And Awards'20



**Dream
Companies to
Work for Award**

29th World HRD
Congress 2021



**CEO of the
year Roop
Bhootra**

World BFSI Congress
And Awards'20



**Rap Songs wins
Silver in Marketing
Innovation**

11th ACEF Asian Leader
Awards'22



**Best BFSI
Brand 2022**

The Economics
Times

www.anandrathi.com

The logo for Anand Rathi Investment Services is positioned on the right side of the slide. It features the name "ANAND RATHI" in a large, gold, serif font. Below this, a thin horizontal line separates the name from the words "INVESTMENT SERVICES", which are written in a smaller, white, sans-serif font. The logo is set against a dark green background that has a vertical strip of a golden, curved building facade on the right side.

ANAND RATHI
INVESTMENT SERVICES

CORPORATE OFFICE:

11th Floor, Times Tower, Kamala City,
Senapati Bapat Marg, Lower Parel,
Mumbai - 400 013