



The path to alpha returns

Personalised Investment Management





sinhasi
ENRICH : NURTURE

The Sinhasi Way



Protect YOUR WEALTH

360° HOLISTIC WEALTH PLANS >

WILL & ESTATE PLANNING >

INSURANCE PLANNING >



Enrich YOUR INVESTMENTS

INVESTMENT PLANNING >

REAL ESTATE PLANNING >

TAX PLANNING >



Nurture YOUR FINANCIAL WISDOM

SMART ABOUT MONEY >

STARTING 'EM YOUNG >

WOMEN & MONEY >

KNOW MORE

Click above or Visit
www.sinhasi.com



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The
path

to



Our 6 Principles
(Left & Right Brain Focused)



Our Philosophy
(The Zen of Investing)



alpha
returns

The Sinhasi Path to
Alpha Returns



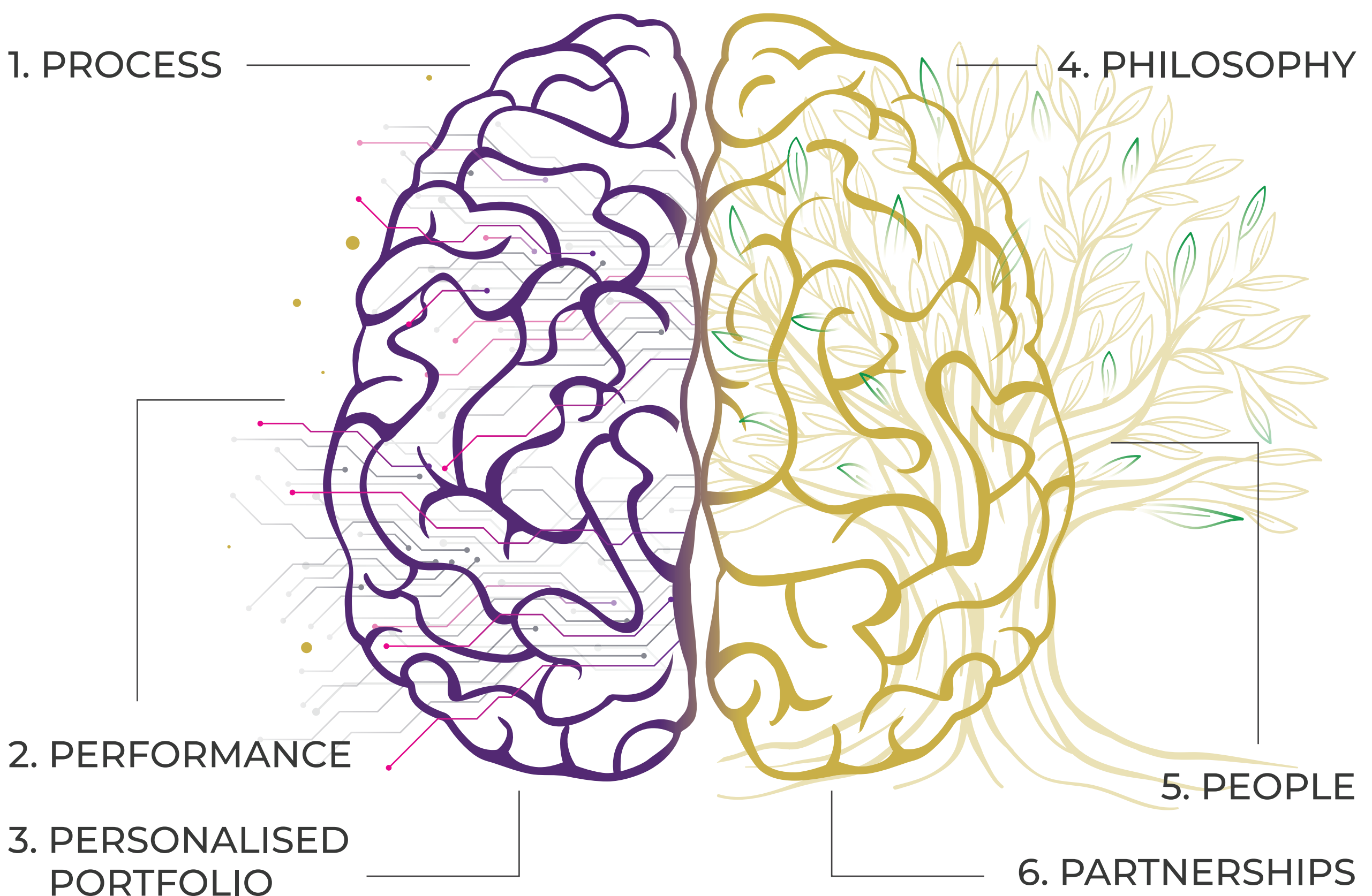
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6 Principles

*that define
Sinhasi's approach
to Alpha Returns*

Principles structured
by the Left-Brain

Principles inspired
by the Right-Brain



READ MORE

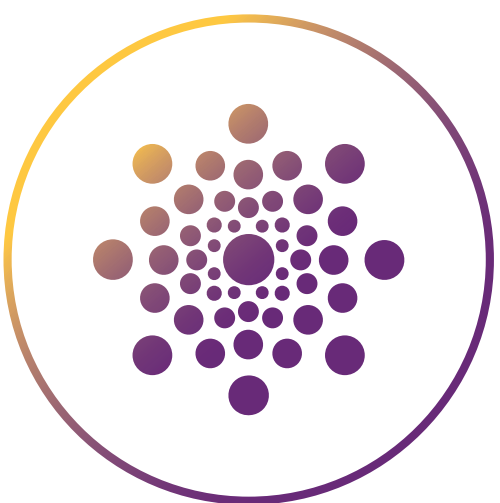
Our Philosophy

*This is not just lip service for us.
It has helped us derive our key
operating principles.*



Mindful alertness coupled
with calm even in the
most troubled times.

1



Uncompromising high
ethics, discipline and
compliance.

2



Cutting edge knowledge
and wisdom married with
the resilience of experience.

3



Appropriate response
and action, if and as
required

4



Ability to say “no” to
knee-jerk actions, even
as we embrace change.

5

KNOW MORE

Click above or Visit >
[www.sinhasi.com
/pages/zen-investing](http://www.sinhasi.com/pages/zen-investing)

A Zen Story

A student asked a Zen Master
*“Where does the road
to Nirvana begin?”*



The Master took his
walking stick and drew a
line in front of the student and said
“Right Here!”

A lesson for investors on how to find
Nirvana or Dynamic Balance **with alertness** for
financial success **with the Zen of Investing Principles
& Solutions** which have been in front of us all along.

UNDERSTAND THE SINHASI WAY >



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What We Do

360° Financial Planning Services



Financial Planning



Investment Planning



Social Responsibility



Insurance Planning



Real Estate Planning



Retirement Planning



Will, Trust & Estate Planning



Children and Money



Tax Planning

KNOW MORE

Our Approach

TO PORTFOLIO SELECTION

RISK RELATED INVESTMENTS:

Our foremost reason is to **ENRICH** your portfolio using the Sinhasi “**PLAN DEEP**” approach while choosing any Risk Related investment opportunities for sound sustainable returns, be it an Asset Management Company, PMS House, Gold Fund, International fund, or Real Estate Fund, keeping in mind a 5 to 10 years minimum time horizon:

1. Pedigree: Our choice of Risk Related Investments across asset classes must have investment management skills with pedigree, credibility and background.

2. Long Term: Fund size (AUM) and number of years of existence are again key criterions with a consistent and sustainable commitment to business on hand during ups and more importantly, the downs.

3. Accessibility: We see the instrument manager’s capability, proven track record and his accessibility to us and clients for regular market views and updates.

4. Normalizing Knowledge across the Spectrum: We prefer not to look for a one-man-army. Strong leadership is a must. Yet credibility and performance should not be dependent on any single manager’s skills or expertise but a basket of experts.

5. Drawdown Contingency: The investment should have consistency of performance over a 3-to-5-year period through market volatility. During bear markets or a major market correction, corrections in the portfolio should be lower than the index.

6. Empathetic Service Levels: Good service levels to both distributors and clients to help combat euphoria or despair is imperative.

7. Ethical Commitment to Business:

Consistency of commitment to business on hand with regulatory compliances always with ethics, compliance and professionalism in the way they conduct their business.

8. Performance Led: All performances should be always consistently above their respective indices for alpha returns to Enrich their investments over the long-term.

DEBT INVESTMENTS:

Here, the keyword is **Protect** and our approach is **SAFETY** at all times.

1. Stability: Organization issuing the long-term debt should have Government ownership, sovereign guarantee, and longevity in their business operations to meet long term debt obligation. There should be no corporate governance issues or credit risk on the product.

2. AAA Preferred: Government issued or backed debt instruments are always preferred, be it short or long-term debt. LIC or PSUs backed instruments are preferred along with high rated corporate debt with credit rating of AAA & above.

3. Future Returns: While investing in long-term debt, market condition should be favorable i.e., Interest rate should be higher than inflation or at its peak. Big NO to long-term debt when interest rates are bottoming out. Yield from long-term debt should match client’s expectations as per the financial plan/portfolio.

4. Easy Access: The investment, be it long term or short term, should be easily accessible to our clients to invest.

5. Tax Efficiency: Look for tax efficiency to maximize return with the credo - Protect.

6. You First: While locking the funds in long term debt, we plan that “you”, our client, has enough liquidity in your portfolio for any short term requirements or emergencies. Safety and liquidity are primary objectives rather than returns for short term debt investments.



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ADVISORY



The Sinhasi Advantage

- **SEBI Registered RIA**
- **Personalised Holistic 360° Approach**
- **Alpha Returns even during Turbulent & Chaotic times**
- **Independent Unbiased Objective Advice**
- **Customization With Deep Client Knowledge**
- **Efficient Advisor: Client Ratio**
- **Goal and return focused**
- **Astute Advice Delivery**
- **Access to Cutting Edge Reports**
- **Track Your Portfolio Online**



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Onboarding Process ADVISORY

1

**Getting to know you:
In-Person Meeting or Online Interaction**

2

**Fill up Our KYC Forms
(CLICK TO DOWNLOAD)**

3

Sign up With us

4

Review Your 360° Base Plan

5

Finalising Your Plan

6

Proper Implementation

7

Regular Internal Reviews

8

**First Plan Review within 3 months
followed by regular planned reviews**

9

"Health of your Wealth" Monthly Updates

10

Track your Portfolio online



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DISTRIBUTION



Why US

- **Execution Focused**
- **Efficient Staff: Client Ratio**
- **One - Stop Platform For Investments**
- **Online & Offline Execution Options**
- **Track Your Portfolio Online**



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Onboarding Process

DISTRIBUTION

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Getting to know you:
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Fill up Our KYC Forms
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Sign up With us

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Review & Finalise Investment Suggestions

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Proper Implementation

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Regular Investment Reviews

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Track Your Portfolio Online

Client Speak

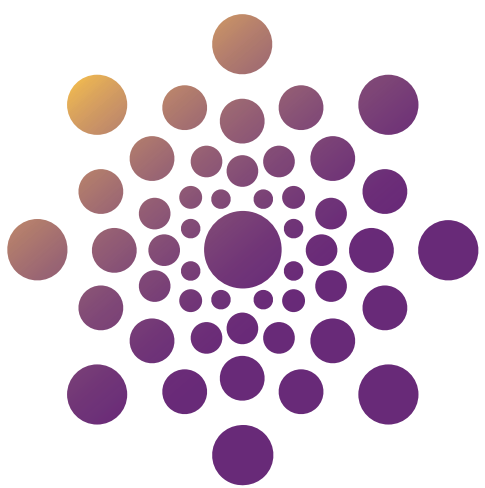


"... Sinhasi has differentiated itself as a boutique investment advisory service which has catered to my requirements in a personalized way..."

Ms. Kiran Mazumdar Shaw

Chairman and MD,
Biocon Ltd., Bengaluru

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"... what is unique about Sinhasi is that it is perhaps one of the few boutique financial advisors who cover the entire gamut of activities required for my family's financial good health..."

Mr. Sunil Alagh

Chairman, SKA Advisors • Former MD,
Britannia Ind. Ltd., Mumbai

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[/pages/testimonials](http://www.sinhasi.com/pages/testimonials)



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To be the **PREFERRED** financial advisor and custodian to those who seek expert partners to **Protect Enrich and Nurture their wealth**, with **sustainable, Alpha returns, especially during turbulent times**.

We **STAND FOR THE BELIEF** that we all can chase our dreams without fear only when we know that we are "**comfortable and aware**" with regard to our money and personal finances and are certain that our finances are growing prudently.

Our **AIM** is to build the most enriching and trusting individual relationships where our clients feel certain and secure, and feel "**comfortable and aware**" as we grow their wealth in a simple, disciplined, and holistic manner.

How we make a difference everyday

WOMEN AND FINANCIAL EMPOWERMENT

As Linda Davis Taylor said,
"**Teach a woman about how money really works, and she can change the world.**"

In today's world true women empowerment can only be realized through financial knowledge and freedom. But many women shy away from this for several reasons. Social and patriarchal issues often make women feel diffident about investments.

At Sinhasi, we urge women to boldly take charge of their finances, and with that, their future. Being led by a woman helps and we are comfortably able to

steer conversations towards constructive possibilities and confident actions.



Our Mission & Vision



CHILDREN AND FINANCIAL EMPOWERMENT

"Talking money to children is still seen as a taboo in many Indian Households. If we can teach our child how to brush his teeth and put on his shoes, why not introduce them to finance!"

- Mimi Parthasarathy

At Sinhasi, we believe that we must start engaging our children around money early in life to prepare them to manage their lives more responsibly.

Talk investments with children early, as early as 13 years. Practice savings and budgeting with your children - planning a birthday gift or a holiday within a budget is a great way to start!

Conversations on finance should be encouraged as a way of life so that it's not new to them when they are adults. Little conversations about saving, investing, growing money, asset classes etc will go a long way.

Some actions we can do for our children before they turn 18 years of age - Get them their PAN Cards, open a Bank Account in their name, letting them write cheques, use online banking & yes investing... Start a small SIP investment for them in mutual funds letting them monitor their finances.





Sinhasi Insights

STAY UPDATED!

Track your Portfolio

WITH THE SINHASI CLIENT PORTAL

- 24 X 7 Access
- Mobile Viewing
- Digitally Secured & Updated

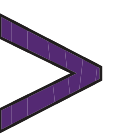


BLOGS & RESOURCES

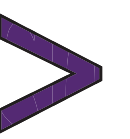
Sinhasi Live

1,516.05
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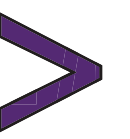
80.5 \$
70.2 \$



Thought Leadership



Holistic Wealth with Zen





Connect with Us



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Mon-Fri: 10:00am - 6:00pm



+91 80 4128 1383

Mon-Fri: 10:00am - 6:00pm



contactus@sinhasi.com >

Write in to our helpdesk



www.sinhasi.com

Visit our website



MIMI PARTHA SARATHY

Managing Director,

SINHASI CONSULTANTS PVT. LTD.

We firmly believe that managing **investments and portfolios** is a **very serious business**. We stand firm and accountable for each one of our clients' financial goals & their future as well as for their families. That is why we are preferred investment partners to our clients over the past several years.

Kindly fill the form so that we may contact you at the earliest to begin your journey with Sinhasi. [Click here](#)



ABOUT US



IN THE MEDIA



MEET THE TEAM



Sinhasi Consultants Pvt. Ltd.

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Bengaluru 560003, Karnataka, India**

Standard Warning & Disclaimer:

- The securities quoted are for illustration only and are not recommendatory.
 - Investment in securities market are subject to market risks. Read all the related documents carefully before investing.
 - Registration granted by SEBI, membership of BASL and certification from NISM
- in no way guarantee performance of the intermediary or provide any assurance of returns to investors.