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**WEALTH FIRST**  
PORTFOLIO MANAGERS LIMITED

Simple Process. Expert Wealth



*"Take a **simple investment idea**  
and take it **seriously**"*  
- Charlie Munger

It's as simple as that.  
We don't believe in short-cuts, because there are none.  
We don't advice for quick returns, because they aren't permanent.  
Rome wasn't built in a day and so wasn't our **all-round investment expertise** and **knack for market analysis**. Our 25 years of experience is invested in ensuring **consistent growth** of our **client's investments**. And that's why **WEALTH FIRST** is considered one of the most trusted **client centric financial asset management advisors** in India.

*"The essence of investment management is the management of risks, not the management of returns"*  
– Benjamin Graham

## Customer-centric Vision

Our only vested interest is ensuring **long term financial growth** of our **client's wealth**. So when we say WEALTH FIRST, you know whose wealth we are talking about.

We are POD – "Prophet of Doom", meaning a person who will **thoroughly analyze all investment** related decisions with the sole objective of **protecting client interest** at all times.

Two things we are not, lemmings and Yes-men. The only thing we follow is the guidance of our own **insight**. And we **dare not to agree** with our clients when their decisions are against their own investment interests.

WEALTH FIRST aims to be the client's **In-House "Finance Team"** by selecting the right strategies.



*"An investment in Knowledge pays the best interest"*

## Research-driven Expertise

At WEALTH FIRST, our clients reap the fruits of our innovation, and they grow on the firm roots of **hardcore research** and rich experience.

This approach garners added value in today's complex financial market environs, where focused research is the only way to decipher the **opportunities hidden beneath volatility**.

Through continuous, **tenacious market analysis**, our research team identifies the finest and perfectly customized **investments ideas/solutions** for our clients.

And last but not the least; we have the **courage** to use our immense knowledge to bolster our client's financial strength.



*"Successful investing is anticipating the anticipation of others."*

## Experience empowered Excellence

Team WEALTH FIRST is a unique ensemble of industry experts. The founder and Managing Director, **Mr. Ashish Shah** is a well-spring of knowledge with more than 25 years of rich experience in Finance and Investment Management. The combined expertise of the entire senior management team spearheading WEALTH FIRST amounts to a century of excellence.

WEALTH FIRST has over 60 professionals including highly qualified MBAs, CFAs and CAs with strategic skills and competencies across various products and services.

Varied assortment of unmatched talents with specialization in various facets of the industry makes WEALTH FIRST a force to be reckoned with.

## Inclusive Services, Exclusive Advisory

**WEALTH FIRST** is a **one-stop-solution** for financial Assets Investment management. Our comprehensive service basket includes Investment strategizing, Asset research, Asset allocation, Tax Planning, Broking service, Treasury Management, Risk management and Retirement planning. These services are catered to by an Inclusive range of Products such as **Direct Bonds -taxable, tax-free, Government securities, Mutual funds, Fixed deposits , PMS, Direct Equity, Pension Products** etc.

We have the world of investment options at our fingertips, but we create **tailor-made solutions** for every client. We have a knack for being **inclusive yet exclusive in our approach.**



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## WEALTH FIRST: Excellence Exemplified

Client relationships spanning **1000+ private and public corporates, provident funds, charitable trusts, educational institutions, family offices** and **individual clientele.**

Pioneers of several **innovative investment ideas** for both Corporates and Individuals.

Our in-house developed **Wealth Tracking System** is the **most widely used system in India** by Investment advisors.



Sr. wealth Management Team



Relationship Managers



Support Team

**Awards speak louder  
than words**



**Winner of All India  
Best Financial Advisor  
Award by CNBC**

