

# Saashwat

FINTECH PVT. LTD.

## Complete Financial, Trading & Wealth Solutions

Comprehensive services spanning investments, trading, insurance, compliance, and financial education—all designed to empower your wealth journey.

Get Start



# Who We Are



- **Integrated Platform**

**A unified financial services ecosystem designed to streamline your investment and wealth management experience.**

- **Wealth Creation Focus**

**Dedicated to building, protecting, and growing wealth through strategic planning and disciplined execution.**

- **Broad Client Base**

Serving retail investors, high-net-worth individuals, and business clients with tailored solutions.

- **Research & Compliance**

Every recommendation is backed by rigorous research and adheres to the highest compliance standards.

# Why Saashwat Fintech

Choosing the right financial partner is one of the most important decisions you'll make. Here's what sets us apart in the competitive fintech landscape.



## One-Stop Financial Solution

From trading to wealth management, investment planning to financial education—access everything you need under one trusted roof.



## Risk & Compliance Framework

Robust risk management protocols and strict compliance standards protect your interests at every step.



## Research-Driven Advisory

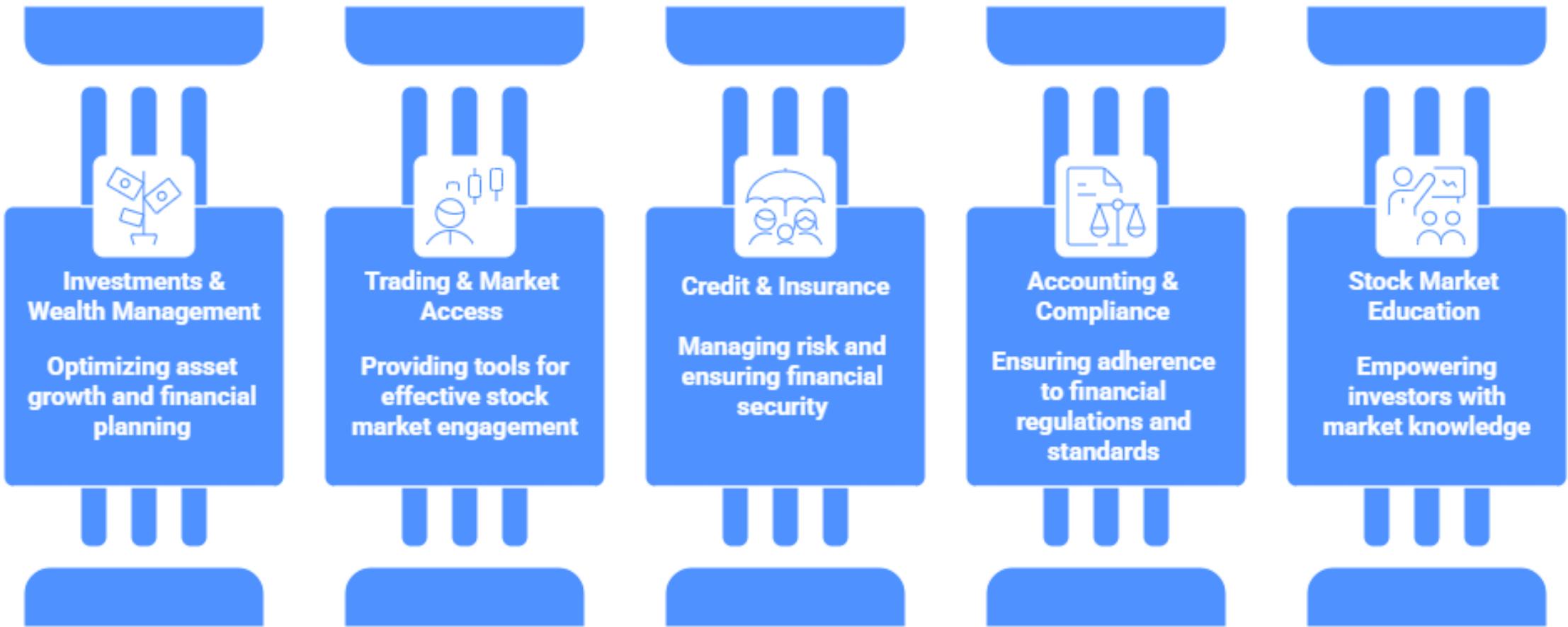
Our recommendations are backed by thorough market research and transparent analysis, never based on guesswork.



## Dedicated Relationship Management

Your success is personal to us. Experience attentive, dedicated support from relationship managers who truly care.

# Financial Services Ecosystem



# FIXED INCOME PRODUCTS

## Stable & Predictable Returns

- NCDs (Primary & Secondary Market)
- Corporate Fixed Deposits
- Market Linked Debentures (MLDs)
- RBI Bonds & 54EC Bonds
- Sovereign Gold Bonds (SGBs)



# MUTUAL FUNDS & ETFs

## Goal-Based Wealth Creation

### Equity, Debt & Hybrid

Diversified fund options spanning equity, debt, and balanced hybrid strategies to match your risk profile.

### Index Funds & ETFs

Low-cost passive investment vehicles tracking major indices, providing broad market exposure with minimal fees.

### SIP & Lumpsum

Flexible investment modes—systematic plans for disciplined accumulation or lumpsum for strategic allocation.

### Tax-Saving ELSS

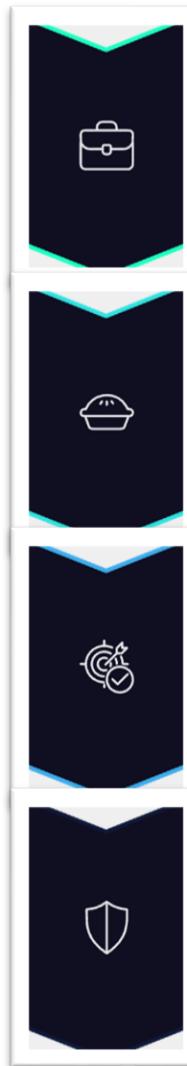
Equity-linked savings schemes offering Section 80C deductions with wealth creation through equity exposure.

### Portfolio Rebalancing

Regular portfolio reviews and strategic rebalancing to maintain optimal asset allocation as markets evolve.

# MANAGED PORTFOLIO SOLUTIONS

## Professional Fund Management



### Portfolio Management Services

Discretionary and non-discretionary PMS tailored to sophisticated investors seeking personalized strategies.

### Multi-Asset PMS

Equity-focused, debt-oriented, and multi-asset portfolios managed by experienced fund managers with proven track records.

### Custom Allocation

Bespoke asset allocation strategies aligned with your unique financial objectives and investment horizon.

### Risk-Optimized Strategies

Sophisticated risk management frameworks designed to maximize returns while keeping volatility in check.

# ALTERNATIVE INVESTMENTS (AIF)

## High-Alpha Opportunities

### Private Equity

Mid-stage and late-stage private equity opportunities in high-growth companies, offering substantial upside potential for qualified investors.

### Venture Capital Funds

Early-stage and growth-stage VC funds focused on disruptive startups across technology, fintech, healthcare, and emerging sectors.

### Yield-Based AIFs

Structured credit and yield-focused alternative strategies providing steady income streams with downside protection.

### Special Situation Funds

Opportunistic investments in distressed assets, turnarounds, and event-driven strategies for sophisticated portfolios.

**Note:** AIF investments are subject to regulatory eligibility criteria and higher minimum investment thresholds. Suitable for accredited investors seeking portfolio diversification beyond traditional asset classes.

# EQUITY & CAPITAL MARKETS

## Listed & Unlisted Opportunities

01

### Listed Equity Investments

Access to blue-chip stocks, mid-caps, and small-caps across sectors with research-backed recommendations and market insights.



02

### Unlisted & Pre-IPO Shares

Exclusive opportunities to invest in high-potential unlisted companies and pre-IPO placements before public market debut.

03

### Special Market Opportunities

Curated special situations including block deals, bulk deals, and strategic placements with attractive risk-reward profiles.

04

### Long-Term & Tactical Strategies

Balanced approach combining long-term wealth accumulation with tactical trades to capitalize on short-term market inefficiencies.

# IPOs, REITs & INVITs

## Primary Market Access

### Which investment opportunity should I pursue?

#### IPO Applications

Participate in initial public offerings of companies



#### Rights Issues & FPOs

Maintain ownership stakes while companies raise funds

#### IPO Funding

Provide capital for companies going public



#### REITs & InvITs

Invest in real estate and infrastructure

# CREDIT & LOAN SOLUTIONS

## Smart Financing Options



### Home Loans

Competitive home loan products with attractive interest rates, flexible tenures, and minimal documentation for your dream home.



### Loan Against Property

Unlock the value of your residential or commercial property with high loan-to-value ratios and extended repayment periods.



### Loan Against Securities

Leverage your investment portfolio—stocks, mutual funds, bonds—without liquidation, maintaining market exposure while accessing liquidity.



### Business & Working Capital

Customized business loans and working capital facilities to fuel growth, manage cash flow, and seize opportunities without dilution.



# TRADING SPACE

## Advanced Trading Infrastructure

Experience institutional-grade trading capabilities with comprehensive market access across all major asset classes. Our robust infrastructure supports both retail and professional traders with cutting-edge technology and real-time execution.



# Market-Linked & Structured Products

## Modern Investment Strategies

Access sophisticated investment solutions designed to optimize returns while managing risk through innovative financial engineering and quantitative strategies.

### Structured Solutions

- Structured Products with tailored risk-return profiles
- Capital Protection Products ensuring downside safety
- Smart Beta & Quantitative Strategies for systematic alpha generation

### Advanced Strategies

- Arbitrage & Hedging Solutions for market-neutral returns
- Thematic Investments capturing sectoral opportunities
- Customized portfolio construction aligned with your objectives

# Complete Insurance Solutions



## Life Insurance

Comprehensive life coverage including term plans, ULIPs, and retirement solutions designed to secure your family's financial future and build long-term wealth.



## Motor & Travel

Complete vehicle insurance and travel protection ensuring peace of mind during journeys, with quick claim processing and nationwide coverage.



## Health Insurance

Extensive health coverage options protecting you and your family from medical emergencies with cashless hospitalization and comprehensive claim support.



## Business Insurance

Specialized SME and business insurance solutions safeguarding your enterprise from operational risks, liability claims, and unforeseen disruptions.

# Stock Market Education

**Learn. Trade. Grow.**

Transform your trading journey with comprehensive education programs designed for every skill level. Our expert-led courses combine theoretical knowledge with practical application.

**01**

## Fundamental Analysis & Technical Analysis

Master financial statement analysis, valuation techniques, and company research methodologies. Learn chart patterns, indicators, and price action strategies for timing market entries and exits.

**02**

## Options Trading

Understand complex derivatives strategies from basic covered calls to advanced multi-leg spreads.

**03**

## Risk Management

Develop disciplined trading practices with proper position sizing and capital preservation techniques.



# Accounting & Compliance Services

Comprehensive financial services ensuring regulatory compliance and efficient business operations. Our expert team handles all aspects of accounting, taxation, and statutory filings.

## Accounting & MIS

- Professional bookkeeping services
- Monthly financial reporting
- Management Information Systems
- Cash flow analysis and forecasting

## GST Services

- GST registration assistance
- Monthly and quarterly return filing
- Input tax credit optimization
- Compliance audit support

## Tax Filing

- Income Tax Return preparation
- Capital gains tax planning
- Tax optimization strategies
- Notice handling and appeals

## ROC Compliance

- Annual filings (AOC, MGT)
- Event-based reporting
- Statutory register maintenance
- Director KYC and DIN services

**Accounting & Compliance Services** ensure accurate financial reporting, statutory adherence, and timely regulatory filings. We manage bookkeeping, GST, TDS, income tax, and ROC compliances with precision, enabling businesses to remain compliant and audit-ready. Our structured processes reduce risk, improve transparency, and allow management to focus on growth with confidence.



Have questions or need assistance with our financial services?

Reach out to Saashwat Fintech and our team will get back to you shortly.

You may also use a slightly more action-oriented version if needed:

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