MONEY PROTECTS

WEALTH MANAGEMENT

Let's build together your life
long safe & sustainable wealthy future

www.moneyprotects.com

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Money Protects is a Techno driven and digitally accelerated company offering Financial Freedom, financial planning, and Wealth Management digital bespoke solutions. Our Asset Backed model & Low risk Asset Building Investments Innovation is a key to bring long term sustainability & growth. We use proven investment strategies designed to meet your risk tolerance and stand up against market volatility. And you can count on our bespoke tech-based options on multi linked channels and impartial guidance based directly on your needs and goal.

Wealth Management

Money Protects investment solutions is designed for individual clients & corporate businesses to meet their optimal financial goals. Our dedicated team of professionals are committed to providing premier service to our clients by creating, sustaining, and multiplying their wealth through our bespoke investment strategy and through our associated partners. Our wealth manager always makes sure to achieve your short- or long-term financial goals by bringing forward the best in asset-class solutions in line with your risk appetite and preferences. Our core objective for investment advisory is client satisfaction and ensuring you achieve your financial goal.

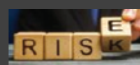
Advisory services in all Asset Class of investments,

• All types of Fixed Income Products - Structured or Hybrid
• IPOs, FX/Currency, Index Fund/ETF, Equity, Debt/Cash Equivalent.
• Funds, Mutual Funds, Capital & Coupon Protected products
• Alternative investments, Real estate, Commodity & Digital Asset.
• Debt, Currency, Crypto, DAM and money market stocks.
• Dividend Stocks, short term & Long-term saving products,
• Risk mitigated Wealth and asset management solution.
• Treasuries & Sovereign Bonds / Sukuks, Inflation-Protected Securities,
• Capital Market and money market exposure.

Investment Approach

Curated selection of proper asset class and managing by expert investment professional help you to achieve optimum return on your investment. In line with risk appetite, preferences and optimal return objectives, our wealth managers focus on balanced and strategic investment approach. Our open architecture platform provides customized investment solutions across all asset classes. We take pride in building long-lasting relationships, with an agenda to drive wealth creation for our clients.

Fact Finding & Financial Goal, Analysis

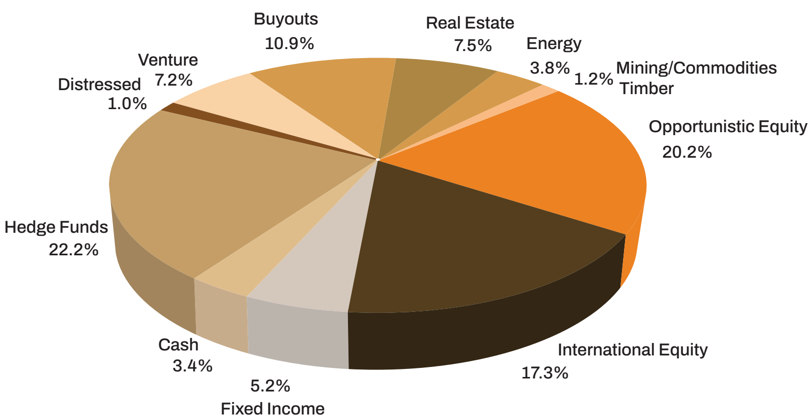


Risk Appetite & Persistency Analysis

Regulation, Products, Advisory

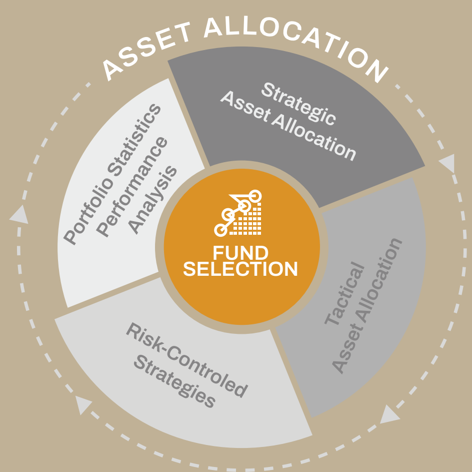
Investment Strategy & Asset Allocation

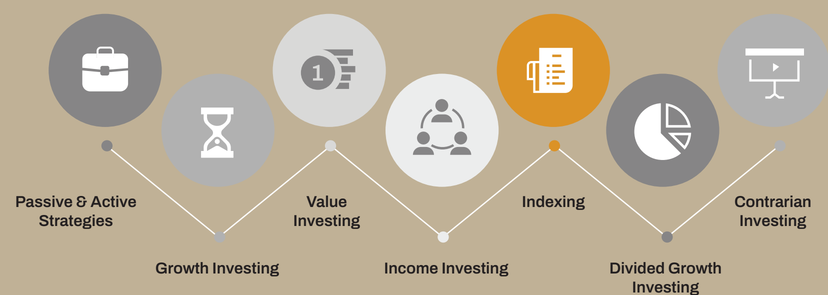
Portfolio Management & Return on Investment



We value and fulfill the objective by

• Open architecture platform and technically driven access.
• Protection and multiplying wealth with latest market trend.
• Risk Mitigated investment-return strategies towards low, medium, and high risks.
• Tailored wealth solution and financial planning in line with short term and long-term objectives.
• Portfolio Control, Timely Updates, and monitoring to maximize your return on investment.
• Risk controlled asset allocation, Portfolio optimization and Portfolio management services.
• Diversified structured investment of various asset class (Equity, Mutual Funds,
Fixed Income & Bonds, Commodities, Real Estate, Alternative Investment and Currency).
•Capital protected, Higher Return and Guaranteed Coupon.
• Global/Offshore Private Banking & Custody Services. Discretionary Asset management.
• Market research, access to capital markets and global indexes.





Risk Management Approach

The risk appetite of investors varies with their situation in life. Risk can be managed by reducing the uncertainty surrounding a potential investment. Our wealth manager is specialized to identify risk tolerance level for building a successful investment portfolio that achieve financial goal by using effective strategy of asset allocation and diversification to minimize financial risk.

Risk Assessment and Minimize financial risk.

- KYC & Due Diligence
- Risk Assessment (Aggressive, Moderate and Conservatives)
- Need base investment strategy, Diversification and Balanced Approach
- Asset Allocation, Regulation, Products and Associated Partners
- Advisory, Monitoring, Portfolio management and Return

Wealth tech, Technology Driven and Global Access

Our wealthtech platform facilitates the process of wealth management, A digital Wealth Planning tool helps in automating the entire process right down to the instrument level, based on each client's risk profile and goals. Data driven analytical insights help to making investment decision. Cloud based Portfolio Management System which facilitates Consolidation, provides Analytics & track the portfolio Performance. API connectivity with various aggregator and trade platform help streamline the entire Product of multi asset class, trade performance and other relevant analysis.

- Robo Advisor & Digitally onboarding
- Risk profile & API Connectivity
- Consolidate all investment on single platform
- Data Driven Analysis & Investment Decision
- Integrated Ecosystem & Portfolio Tracking

Capital preservation, creating and Multiplying wealth

Our open architecture platform provides customized investment solutions across all asset classes. We leverage our bespoke wealth advisory services in line with the objectives of lifetime safeguarding, protecting, and creating wealth. We also develop an investment strategy, portfolio review, risk management, customized investment solution, market research, and capital market for our clients. We monitor capital growth and regular income on the investment by access to the capital markets and global indexes. Our experienced advisors will help you to design an effective wealth protection strategy in line with multiplying wealth objective by curated selection of investment options to help you achieve prime returns on your capital and provide a financial safety.

- **Advising in Multi Asset Class (Equity, Bonds, Funds, Alternative investments, Debt Instruments, Currency)**
- **All type of structure products (Phoenix Auto call, leverage notes, reverse convertible, Participatory notes, Growth, and income protected notes, PPN, Warrants etc.)**
- **Fixed income products, Goal Oriented Bonds, Funds, and mutual Funds etc.**
- **Primary Market & Secondary Market products, Capital market & Money Market Investment.**

Offshore/Private Banking and Custody services

We are associated with Global private banks and Asset managers to advise a need-based solution related to Bank and Investment account with the range of multiple currency with global access. Deposit accounts in all major currencies and most emerging market currencies Safely move globally. Wide range of banking services is tailored to meet the needs of HNI and corporate clients enabling to manage your finance and requirements wherever you are in the world. We advise global custodian multi banking platform in multiple jurisdictions related to requirements. A tailored bouquet of dedicated and personalized services including technological support provide an efficient process of worldwide transaction. Credit solution, customized reporting and secure process support you to track your portfolio performances and settlement of securities transaction.

Saving Plan and Insurance

Disciplined approached of regular saving into Systematic Investment Plans (SIP) in line with the long term or short-term objectives based on risk appetite and financial goal, always leads to protected and safe life for everyone. Balanced Diversification of investment into multi asset class enabled secure and global access to fulfill future needs. Also, we offer tailored solutions to meet the requirements of your family within a budget suitable to protect future uncertainty. A life insurance provides a financial cover to families when they are in vulnerable situation. We offer a range of products tailored to your needs as,

-Systematic Investment Plan, Unit Linked Insurance plan.
- Single Premium and Regular premium investment plan.
- Whole of life & Term Protection Insurance plan
- Critical Illness & Terminal Illness cover

A financial Goal > Timeline > Investment amount > Financial Advisor > Choice of Funds > Placement

Education Plan

Our education plan comprises with Saving and insurance designed to ensure parents there would be a protected future and will have sufficient funds available for child's education as all the parents concern is their contribution to be utilized for success of child. The choice of educational options grows exponentially globally and so do the involved costs. so, as a protected approach an education plan starts as early as possible.

Retirement Plan

A type of investment plan that help to accumulate a part of your savings over a long-term period to have a secured financial future. It helps you to deal with uncertainties post-retirement and ensures a steady flow of income after retirement. We can help you to secure retirement life with a wide range of product.

Environmental, Social, Governance – ESG Strategy of Investment

An investment decision through ESG analysis mitigates hidden risks that may not be traced by mainstream financial analysis. ESG factors into investment strengthen the strategy, approach, and decision to get optimal return within the timeframe. Our curated investment approach develops to meet ESG objectives to manage risk and generate sustainable returns to meet financial goals of investors.

Trade Globally in FOREX, ETF, Stocks, Crypto, CFD, Indices etc.

WE are Associated with a trusted global Partner with competitive pricing. We connect MT4 & MT5 with best-in-class products, smart data tools, amazing customer support and secure payment solutions. We diligently work to meet our client's best interests at the center of our business. Our fintech based approach provides online tech for trading FOREX, ETF, stocks, Crypto, CFD, Indices, commodities, and features.

Global service providers

- Asset Management Companies
- Private Banks and Investment Banks
- Offshore Banks and custody service providers
- Fund managers /Global Funds
- Aggregators of investment solution
- Open Architecture trade Platforms
- Fixed income providers.
- FX, Capital market & Money market trader
- Global Financial solution provider.

Kindly get in touch with our dedicated Wealth manager to know more about our associate partners and products. We are an accomplished and seasoned wealth management professionals with multi-functional experience in Investment services, wealth management, and banking. We are expert in handling high & ultra-high-net-worth individual and institutional clients.

WEALTH MANAGEMENT

Our Dedicated team
of wealth managers is ready
to advise you on a curated selection
of wealth management products.

For more information:

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info@moneyprotects.com

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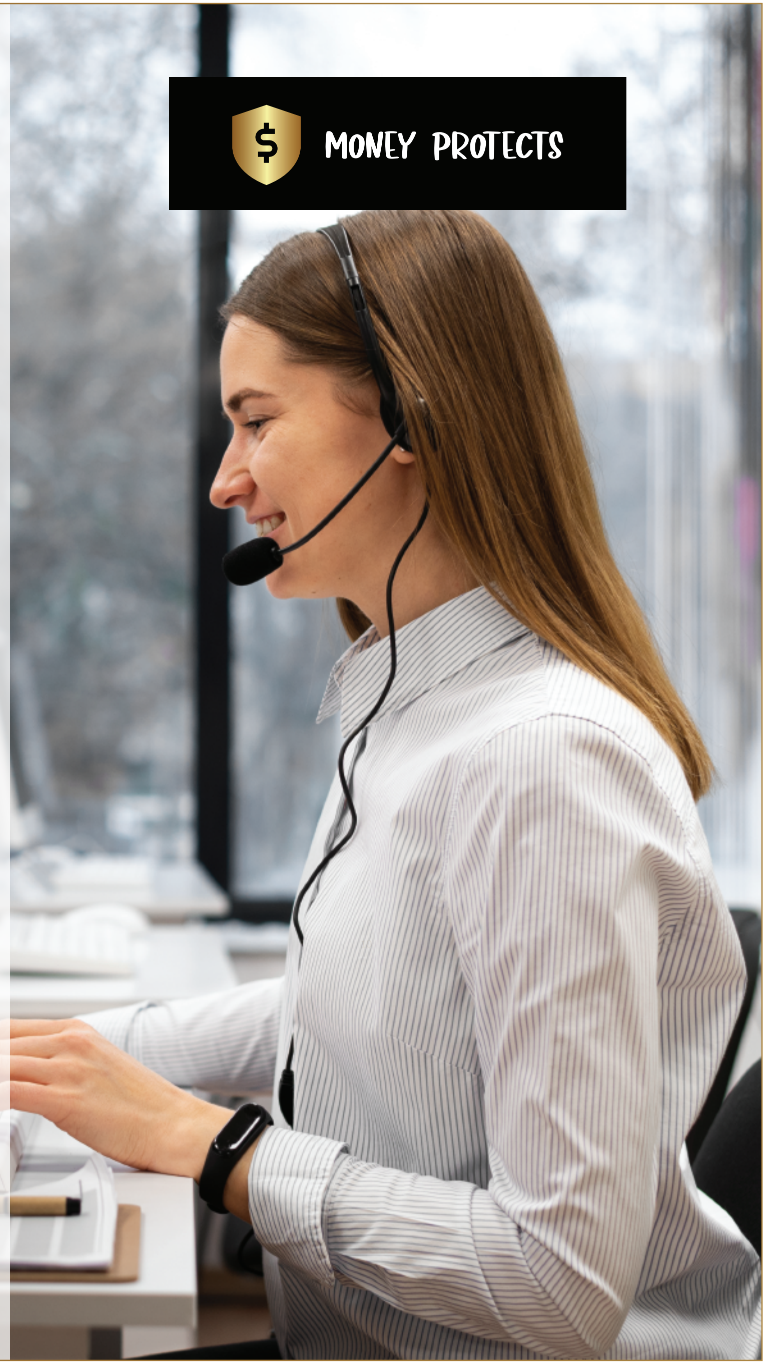

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