

Invest in your future

wealthy



 Equity

“The stock market is a device to transfer money from the impatient to the patient.”

Warren Buffett



The India Growth Story Is Real

 **Jefferies**
@Jefferies · Follow

Jefferies' Head of Equity India Research @mahndurkar predicts that India will be 3rd largest economy by 2027. He expects India's GDP to hit \$5T as a result of continued reforms, which would surpass Japan & Germany and make it the fastest growing large economy over next 3 yrs.

5:43 PM · Feb 28, 2024 · 995 Views

Everyone believes that this is India's decade

 **Radhika Gupta** ✓
@iRadhikaGupta · Follow

As far as India is concerned, the Indian economy has doubled every 6 years since 1980 and now that doubling is happening at a 4 trillion dollar scale. Our demographics and our spirit of entrepreneurship and innovation are what define the India story, and will continue to do so. We can and should be the world's third largest economy.

Last edited 8:05 PM · Jun 4, 2024

240 Reply Share

Morgan Stanley | RESEARCH
March 12, 2024 05:30 PM GMT
Asia Economics

The Viewpoint: India - Why this feels like 2003-07

GDP – Stronger For Longer

Real GDP growth rate

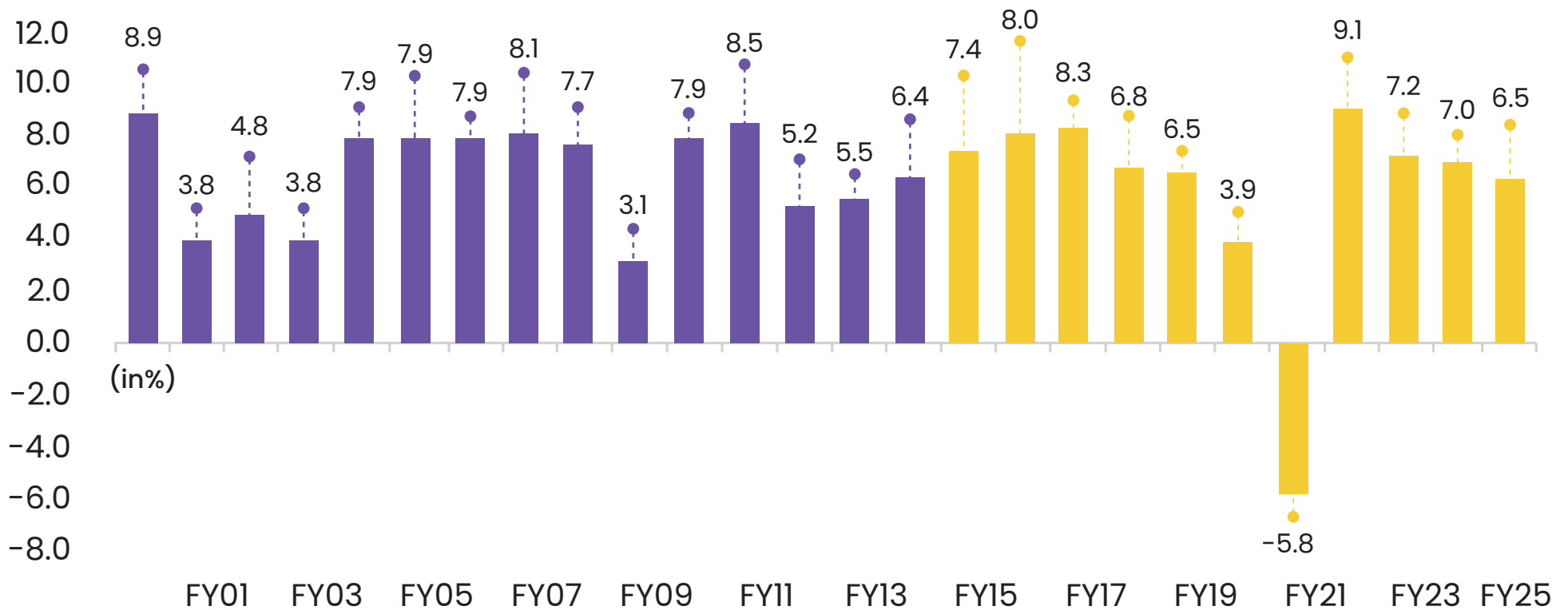
IMF projects GDP growth for 2026...

India at 6.2%

China at 4.5%

US at 2.1%

Euro Area at 1.2%

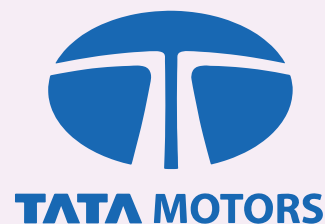


Source: Bloomberg, Jefferies

But how do you participate in this growth?

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By investing in companies that contribute to this growth!



Disclaimer: This is not a recommendation. This is only a sample of some of the large companies in India to illustrate the opportunity available to an investor.

And you can do that with Equity Mutual Funds

Professional management

Mutual funds are handled by investment experts with vast experience

Diversification

Invests in a portfolio of stocks across multiple industries that reduces risk

Regulated

Monitored by the Securities and Exchange Board of India (SEBI) that ensures transparency



Easy on the wallet

Start investing with as little as Rs 500

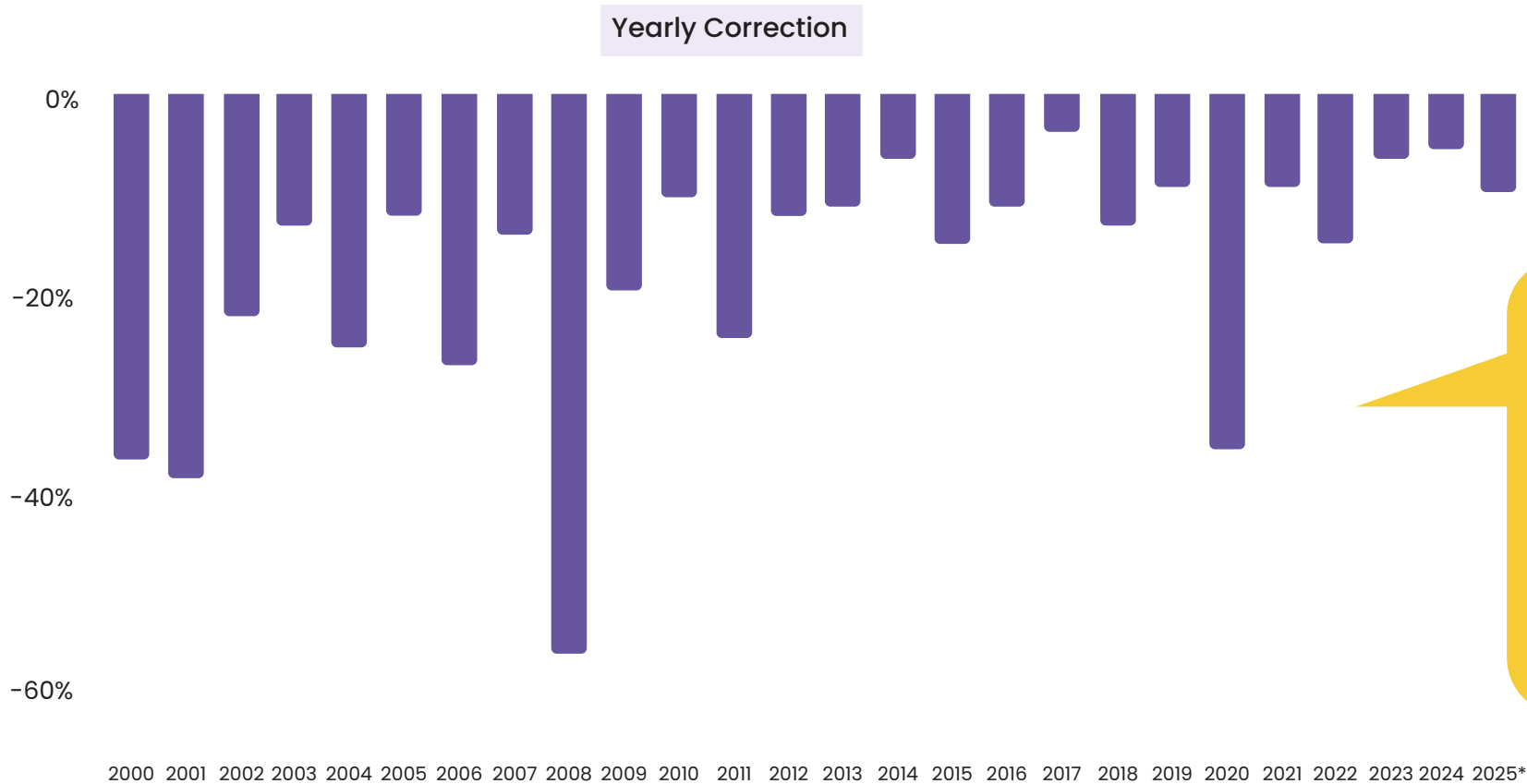
Tax Efficiency

Lower levels of tax of compared to buying and selling stocks individually and even wins over others investment options

Choice

Different types of funds to meet varied investor risk and return needs

But are you worried that the stock market is a scary place?



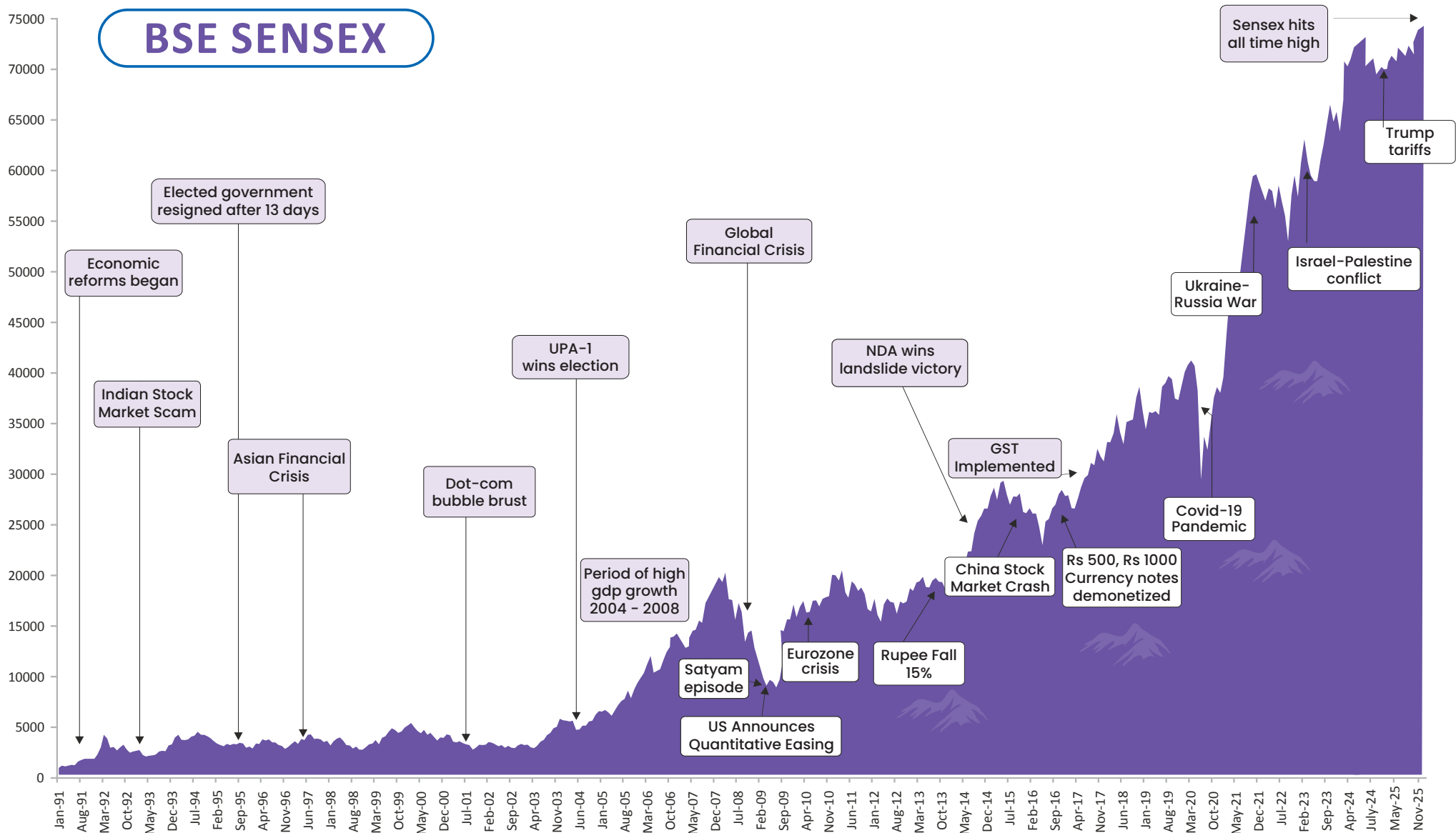
Guess how many times the Sensex has corrected by more than 10% during a year?

...

20 times since 2000!

*Till 31st December 2025

Well, don't panic: Because positivity trumps negativity



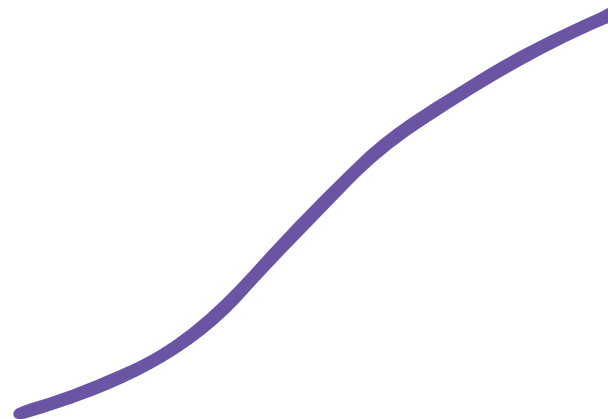
Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

Remember, if you zoom out...

Short Term



Long Term



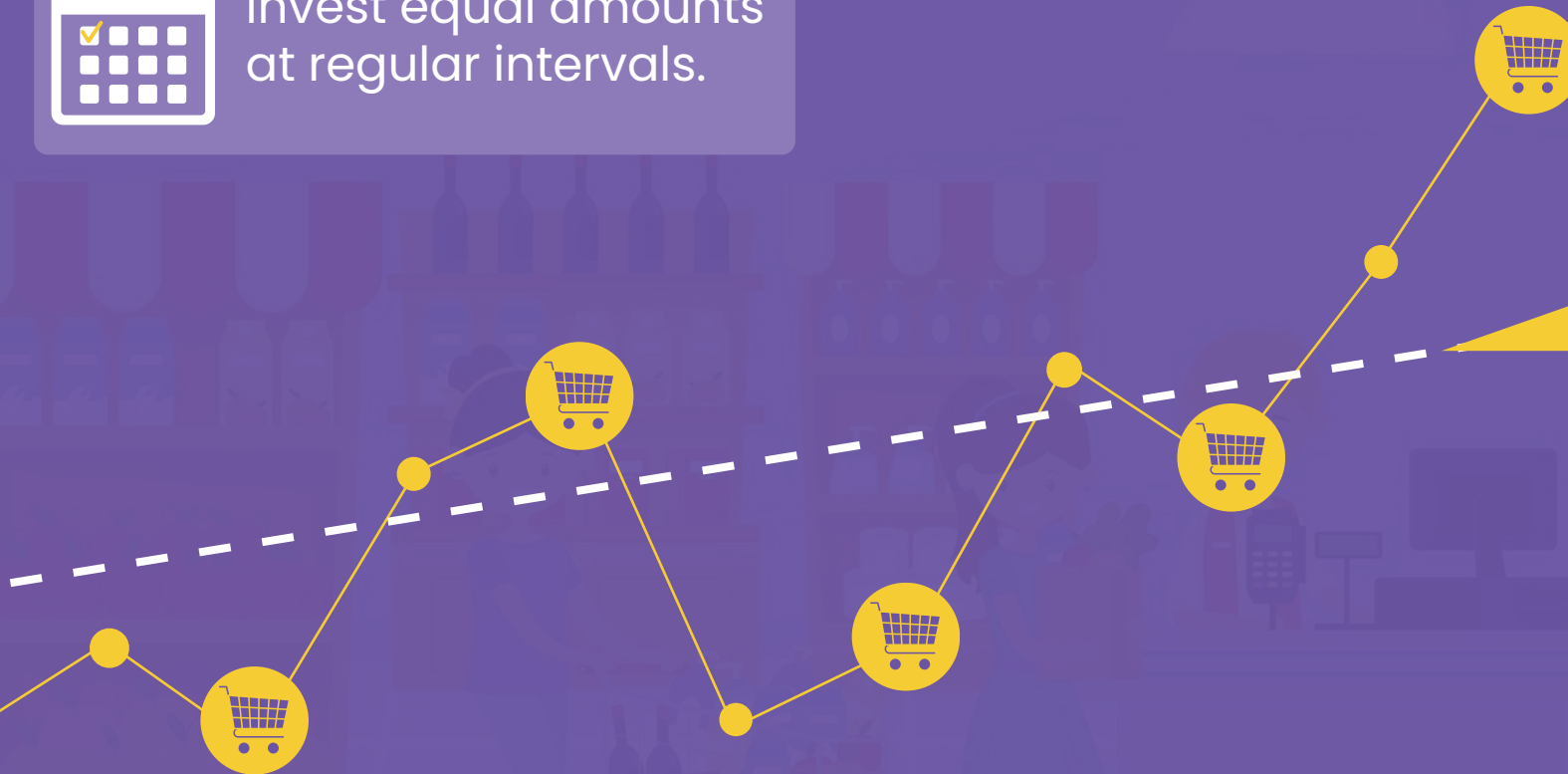
Your worries will
have disappeared

Image inspired by Carl Richards

Smart investors SIP



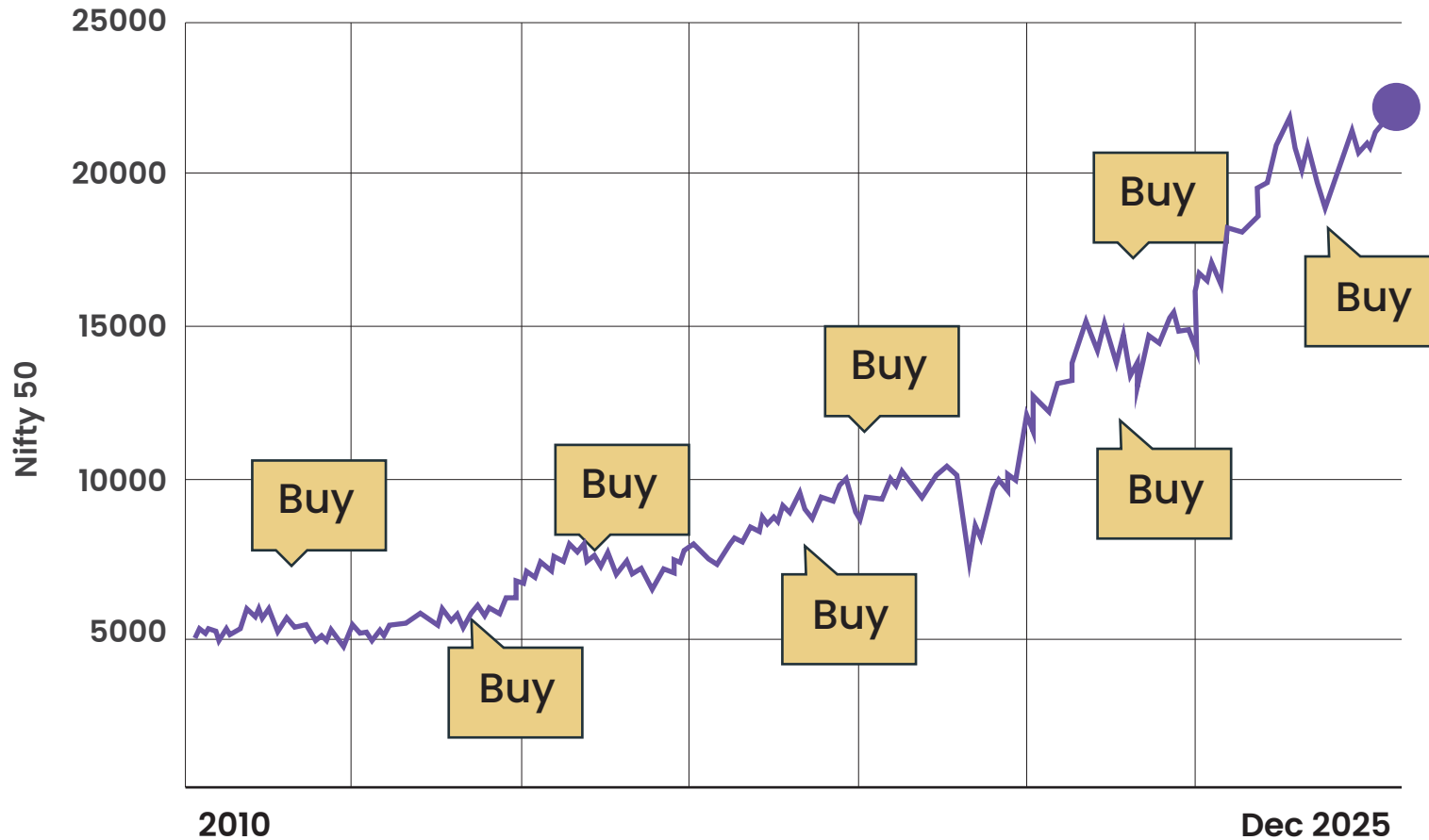
Invest equal amounts at regular intervals.



Average Buy Price

When you invest every month, you end up buying at highs and lows and it all averages out

Keep Investing. Keep Believing. Keep SIPing



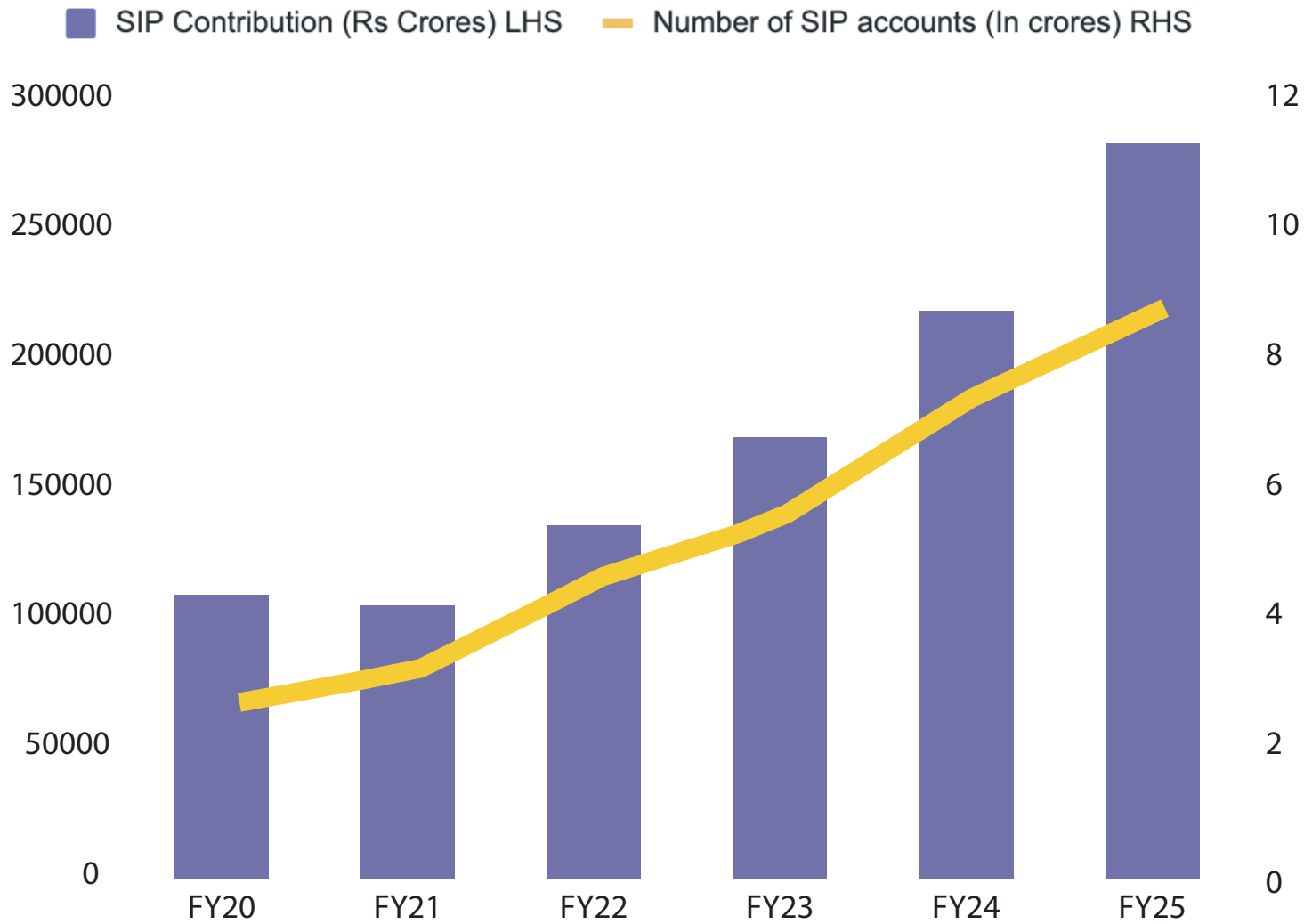
What if you'd invested in a Nifty Index fund systematically through the ups and downs?

A total investment of ₹16.8 lakhs turned into over ₹45 lakhs!



Disclaimer: Past performance is not a guarantee of future returns

India is SIPing



The number of SIPs have increased nearly 3x since April 2020



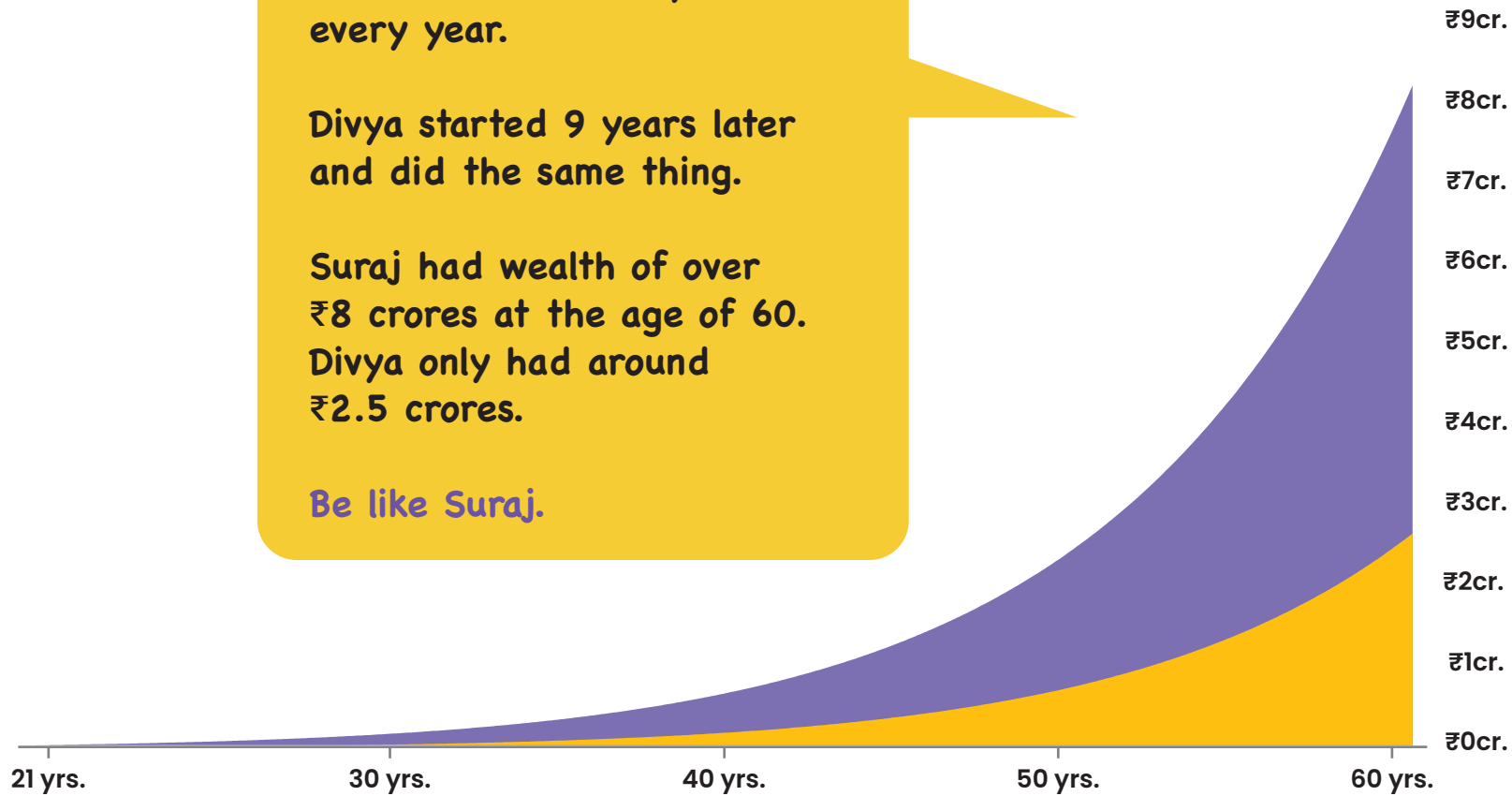
Just start!

Suraj started investing ₹5,000 at the age of 21. He increased the SIP by 5% every year.

Divya started 9 years later and did the same thing.

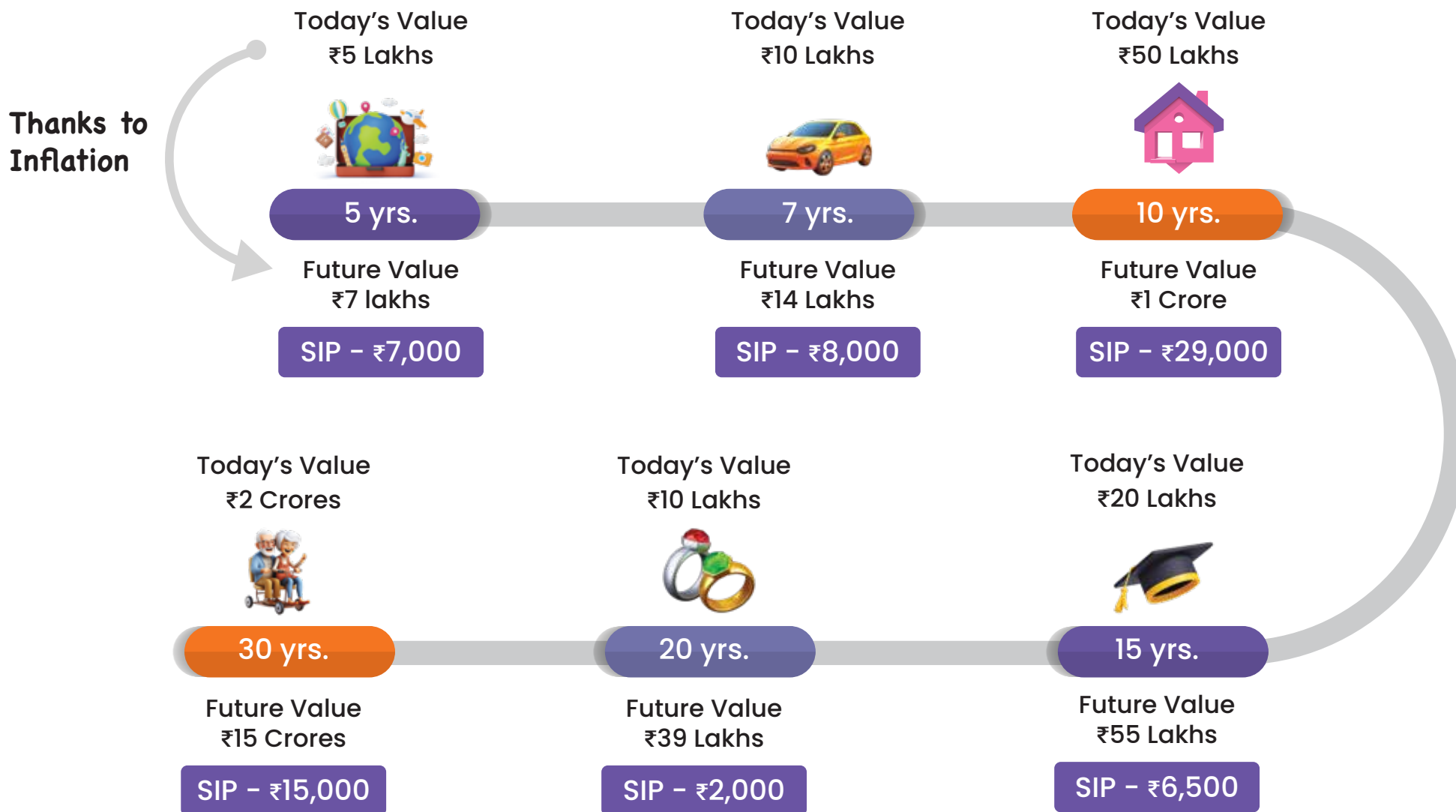
Suraj had wealth of over ₹8 crores at the age of 60. Divya only had around ₹2.5 crores.

Be like Suraj.



Note: Investment returns of 12% per annum has been assumed for this calculation. Investments are subject to market risk and there is no guarantee that this will be achieved in the future.

Live your dreams. One SIP at a time.



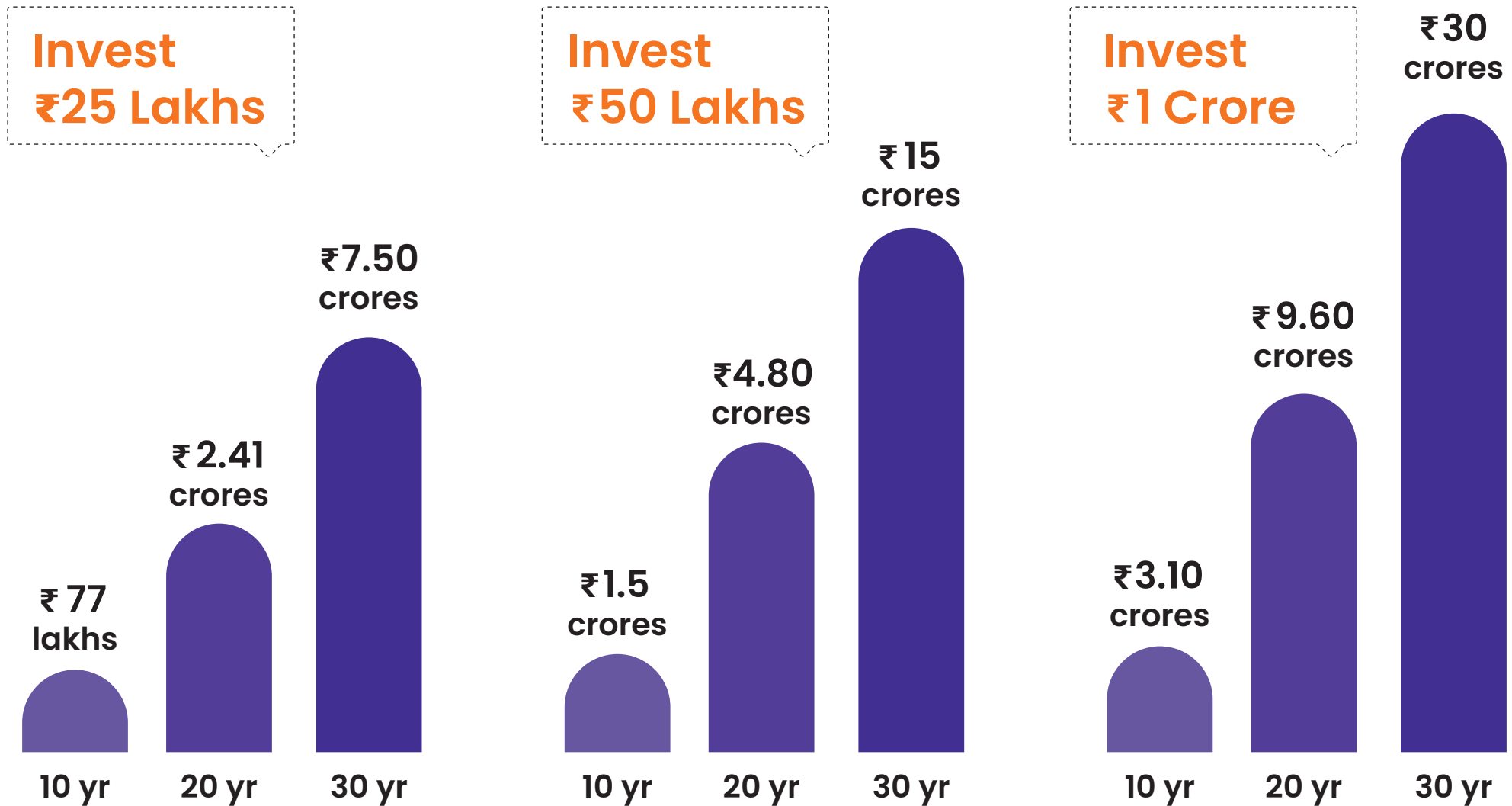
Assuming inflation at 7% and return on investment at 12% per year. The monthly investment (SIP) assumes that you increase the amount by 10% every year.

Market corrections won't hurt lump sum investing too...

If you give it enough time

Major Falls > 20% since 2000	Absolute Decline	Nifty 50 TRI	Debt	Inflation
		Annualized Returns - from Peak till Oct-24		
2000 Dotcom Bubble	-50%	13%	8%	6%
2004 Indian Election Uncertainty	-30%	14%	7%	6%
2006 Global Rate Hike Selloff	-30%	12%	8%	6%
2008 Global Financial Crisis	-59%	10%	7%	6%
2010 European Debt Crisis	-27%	11%	8%	6%
2015 Global Market Selloff (Yaun Devaluation)	-22%	12%	7%	4%
2020 Covid Crash	-38%	16%	6%	5%

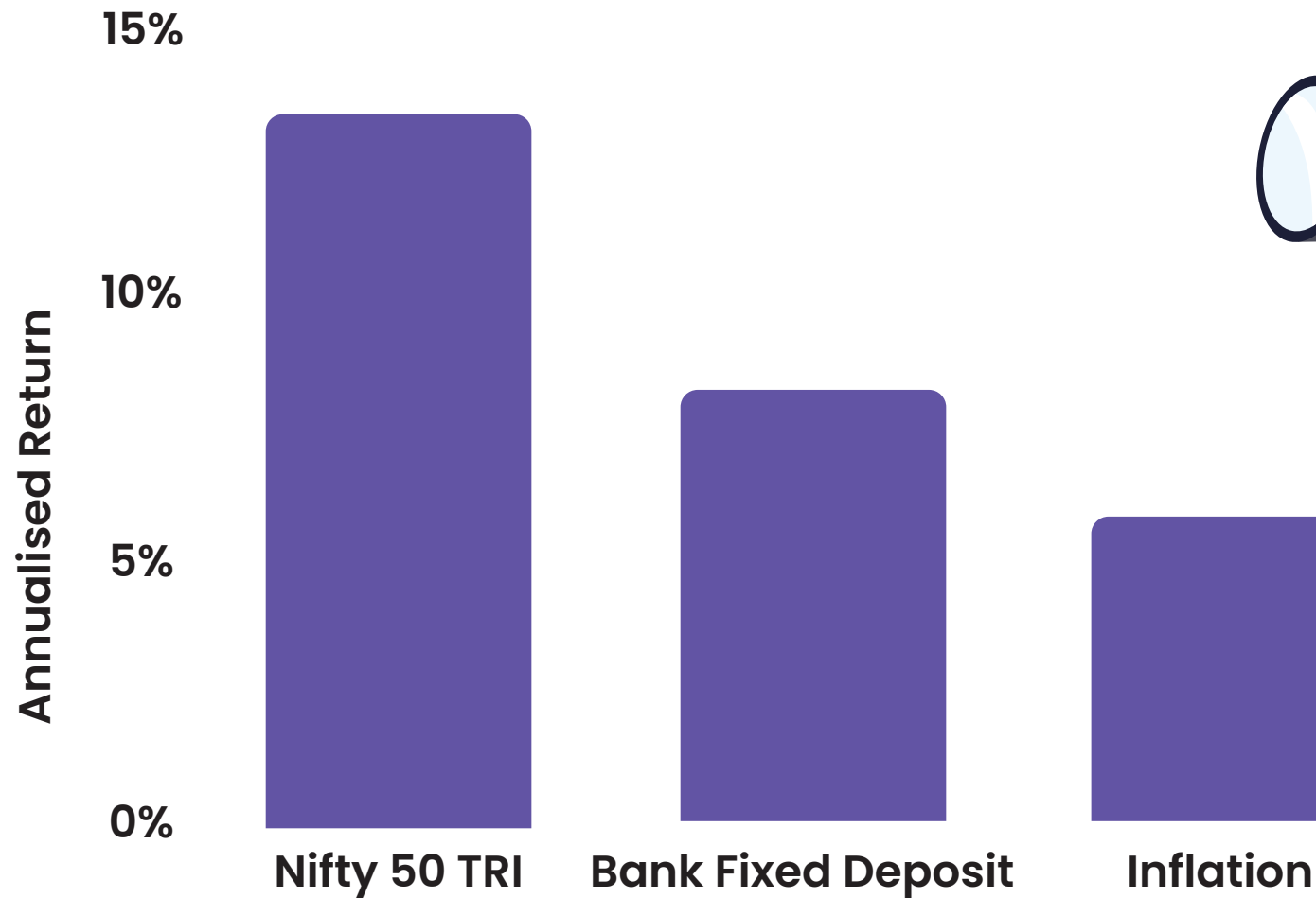
Invest now and secure your future



Note: Growth estimated at 12% annually

It's the Age of Equity

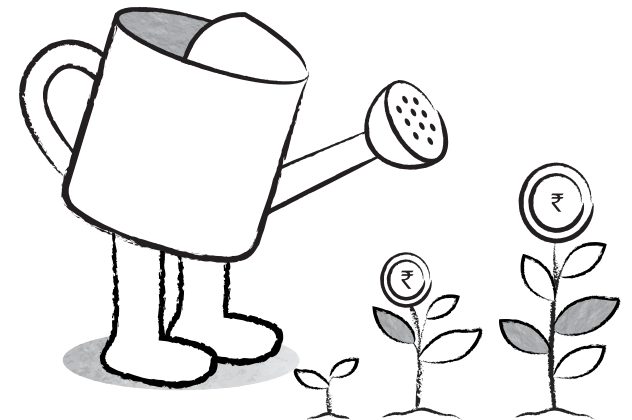
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Note: Returns for 1st Jan 2000 to 31st Dec 2025. An average of the 5-year bank FD rate during this period has been used for calculation.

To sum up

- ◆ India's stellar economic growth will continue.
- ◆ Stock markets have proven to be the greatest avenues for wealth creation.
- ◆ The ups and downs can be scary but you can make it work to your advantage through Systematic Investment Plans (SIPs).
- ◆ Set your goals and automate your investments to achieve them.
- ◆ Lump sum investing will make you money in the long-term.
- ◆ Your Wealthy Partner is here to help you.



Help your clients build wealth today

Here are some top features on the Wealthy app and platform

Wealthy Select

Use our ratings system to identify top-performing funds for clients.

Wealthcase

Curated equity baskets by SEBI-registered investment advisors (RIAs).

Step-Up SIP

Help clients gradually increase their SIPs as their income grows.

Client Reporting

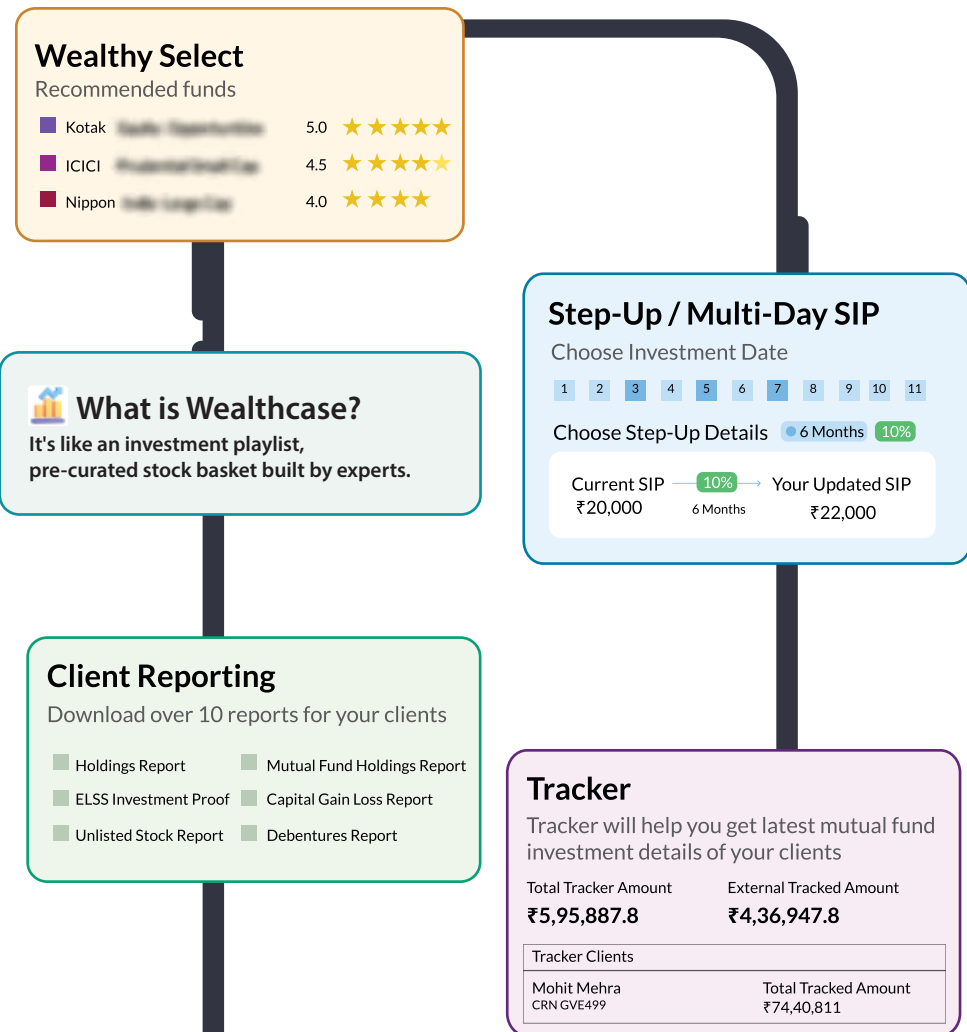
Access 10+ tailored reports based on your clients' funds.

Tracker

Monitor clients' external investments & seamlessly switch funds to your ARN.

Poster Gallery

Acquire new business with our white-labelled creatives around MFs, SIPs' and more.





WealthyIN Customer Services Private Limited AMFI registered Mutual Fund Distributor (ARN-106846)

Buildwealth Technologies Private Limited IRDAI Corporate Insurance Agent - CA0711

Disclosure Document as prescribed by SEBI Corporate Identity Number: U67110KA2022PTC159371, SEBI Stock Broker Registration No: INZ000308532, Depository

Participant: IN-DP- 737-2022 Member: NSE TM ID 90293, BSE TM ID 6798, RA License -

SEBI Reg No: INH000012175, BSE Enlistment No: 5767.

 www.wealthy.in

Disclaimer: Mutual fund investments are subject to market risks and past returns are not a guarantee of future returns.

Our take on disclaimer: Yes, investing is a risky subject and you may also lose money. But each one of us is losing more money by not participating in the markets. The key to good investing is asset allocation, discipline, and avoiding bad apples. After that, volatility or ups and downs is the second nature of the market. Sticking to your asset allocation and avoiding that animal called greed is the best way to ensure that your money grows and grows well. But please remember that the information we've shared in this report is not a recommendation and has been created from sources we deem reliable. We may alter the data in the report periodically to convey the message of investing. So ensure you consult a qualified investment professional before taking decisions with your hard-earned money.