

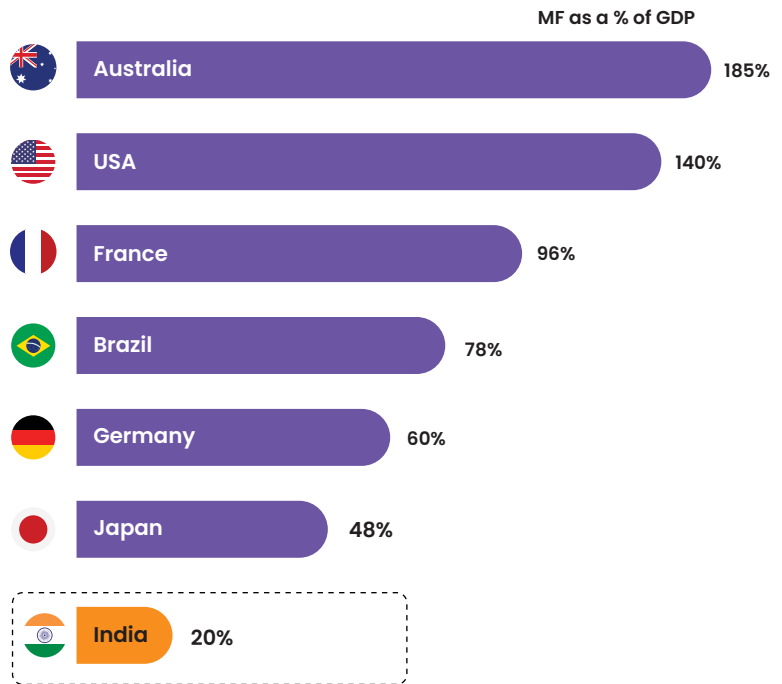
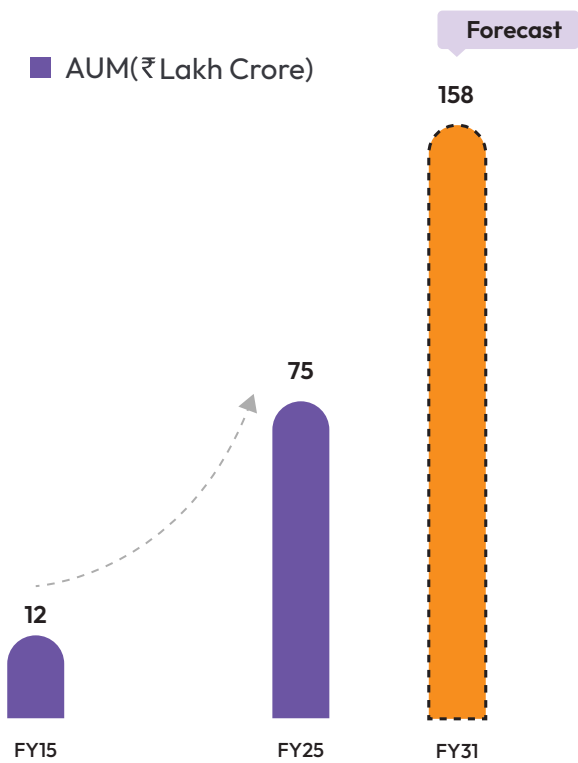
Scale your **Mutual Fund Distribution** business

Become a **Wealthy Partner**. Transform your business with AI & tech-driven solutions.



India's Mutual Fund opportunity is massive

But we still have a long way to go



The data spans 2020–2025 across countries, depending on availability. Reliable web portals and official sources have been used wherever possible

Source: AMFI, Wealthy calculations (basis annual growth rate of 12%)

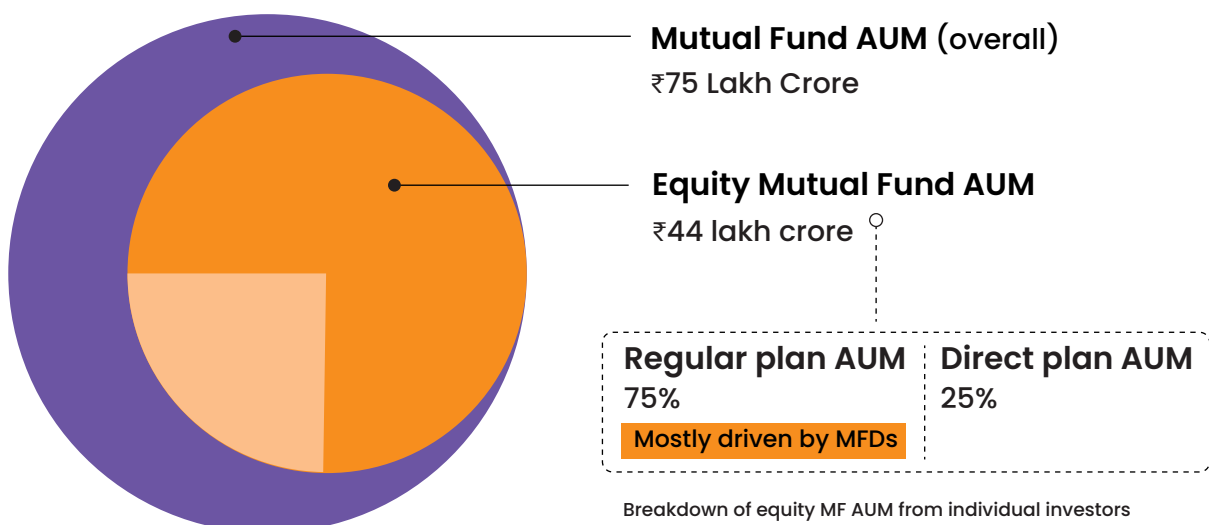


India has Only 1.8 Lakh Active MFDs!



1 MFD for 8,160 people!!

Mutual Fund Distributors are the backbone of the industry



Indians prefer to buy Mutual Funds from MFDs

India **NEEDS MORE** Mutual Fund Distributors

Source: AMFI

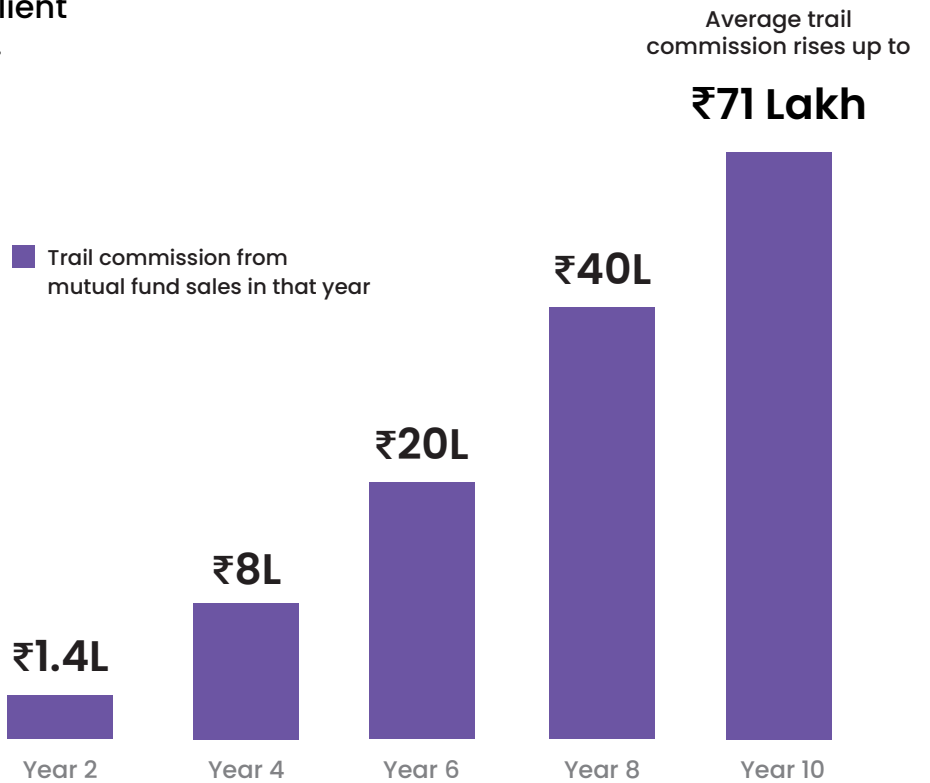
As an MFD, your earnings are unlimited

The power of trail income

You earn an income until your client stays invested in a mutual fund.

You add
5 clients/month
who do an SIP of
₹20,000 each

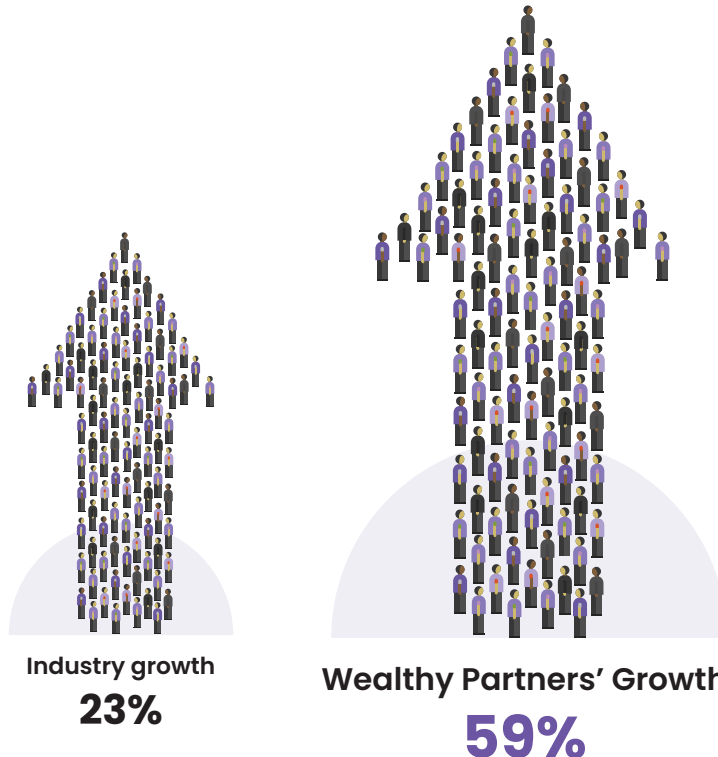
Assumptions:
0.7% trail commission
12% market growth



So, choosing to be an MFD is a great choice.

The next best decision is to choose Wealthy as your partner.

Based on data provided by AMFI FY24 to FY25



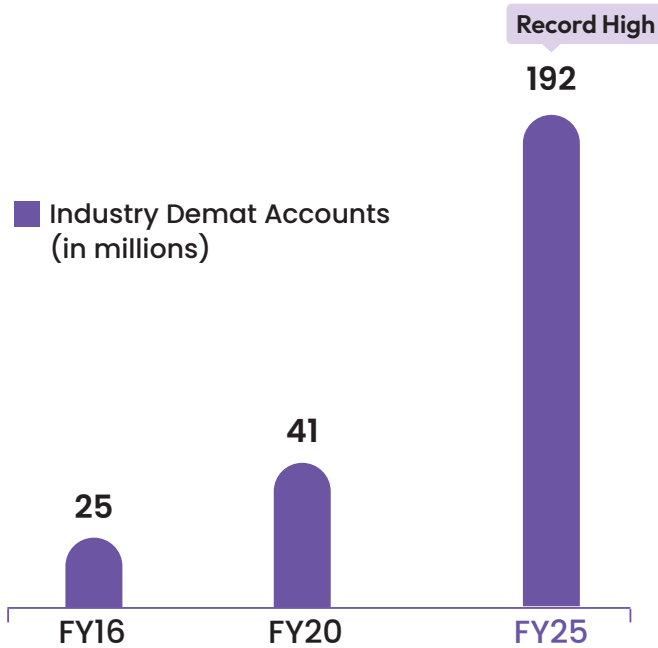
Transactions from Active Wealthy partners FY24 to FY25

Almost **3X** industry pace!

The opportunity for an MFD is more than Mutual Funds

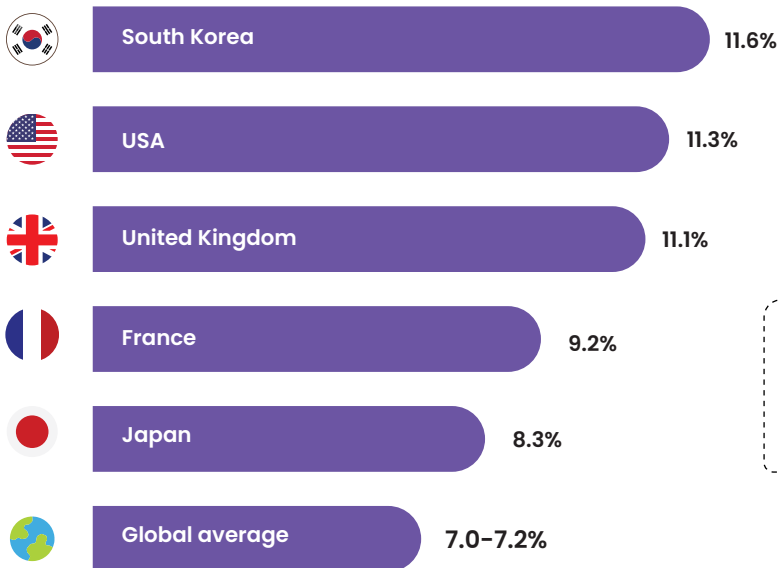
More Indians are participating in the stock market

Wealthy Partners (MFDs) can seamlessly offer broking to their clients on our platform



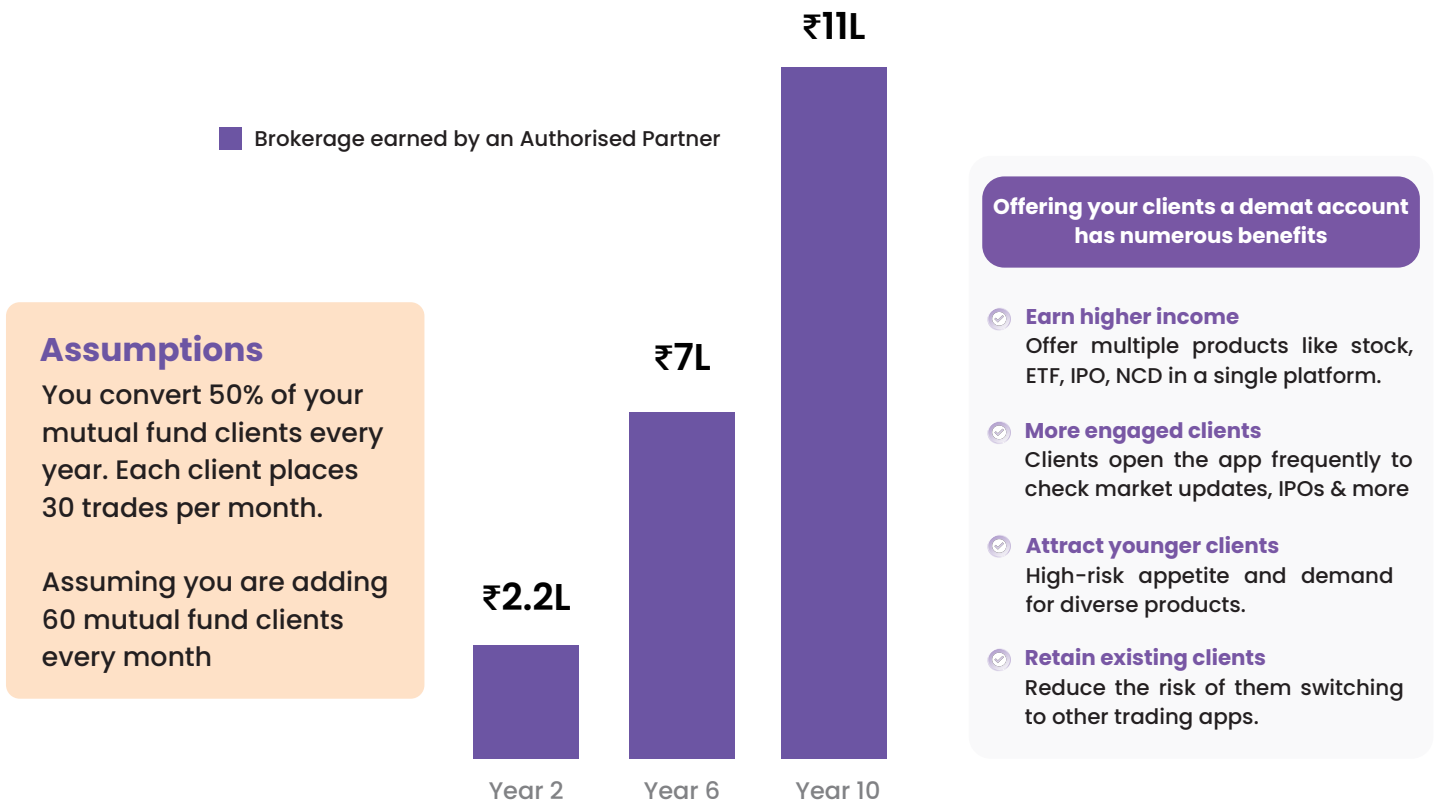
Source: NSDL, CDSL

The opportunity in Insurance is also massive

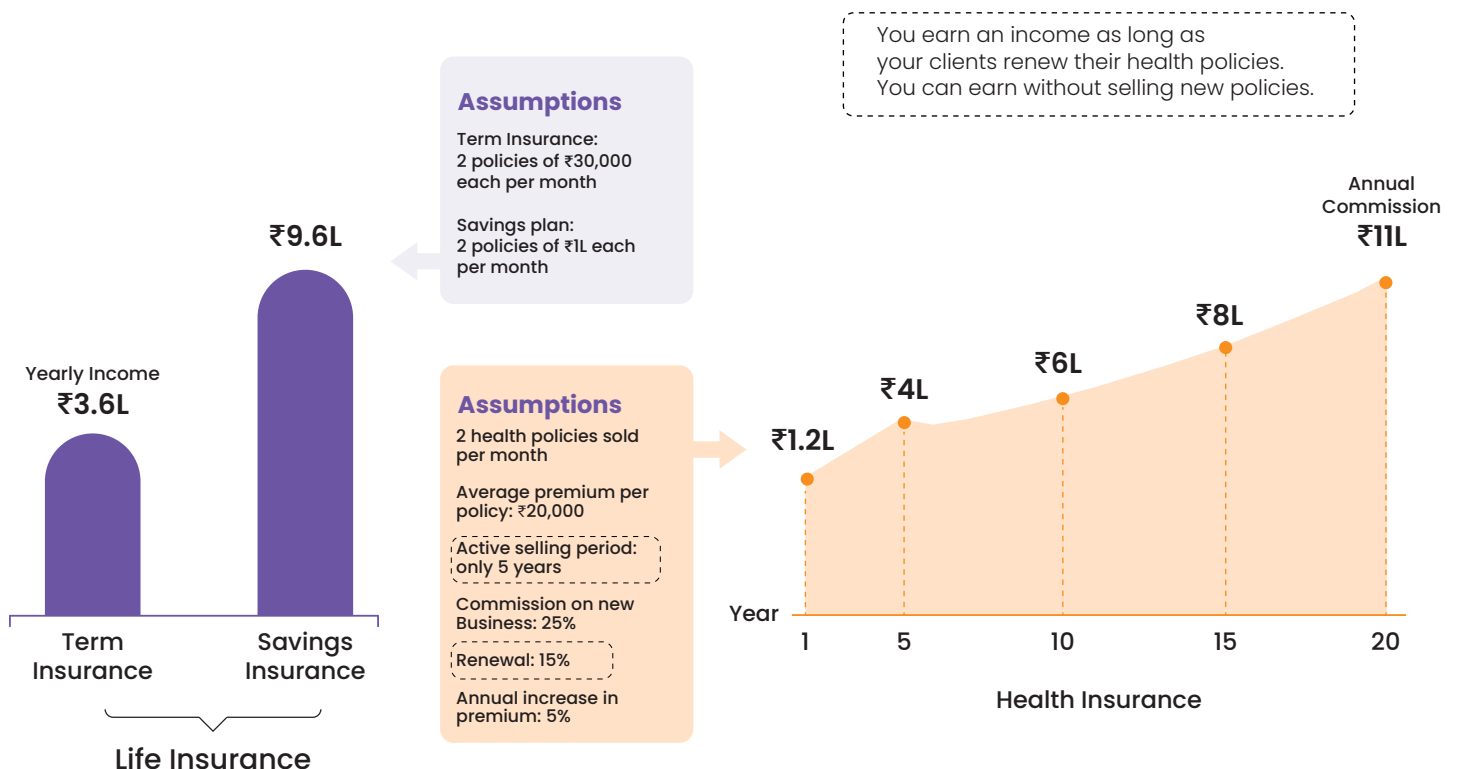


Total Insurance premiums as a percentage of GDP

As a Wealthy partner, you earn more by offering stock broking to your clients

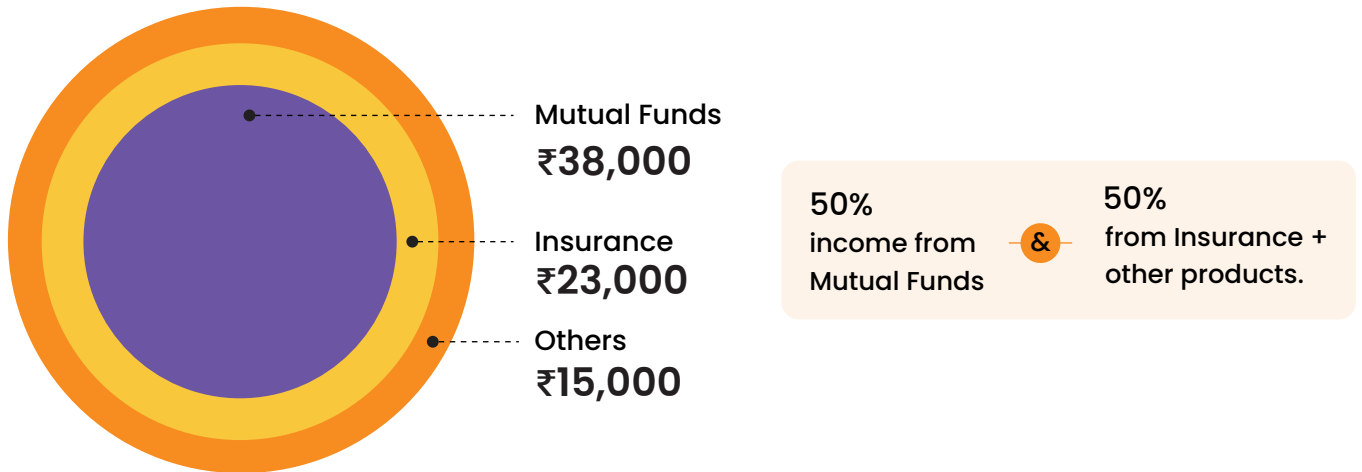


Insurance is a safety net for your clients & a great source of additional income for you



Earn more than 2X income with Wealthy's powerful cross-sell ecosystem

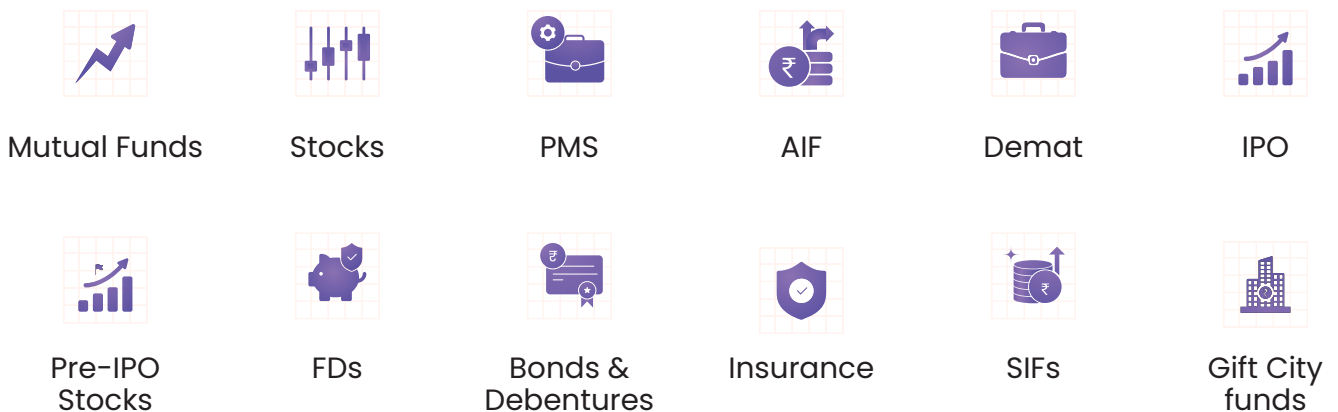
A partner who builds a mutual fund AUM of ₹1 **Crore** with us in the first year is able to earn **₹76,000** as income in their first year.



We assume the MF AUM reaches ₹1 crore by the end of Year 1, built through a steady monthly addition of ₹8.33 lakhs. An average trail commission of 0.7% is assumed, resulting in a Year-1 closing trail income of approximately ₹38,000. Wealthy's broad product suite allows you to earn 2x or more from the first year itself, by meeting client demand beyond mutual funds and without adding complexity to your workflow

The widest range of financial products on 1 platform

Keep every client relationship with you, without switching between broking, insurance or PMS platforms.

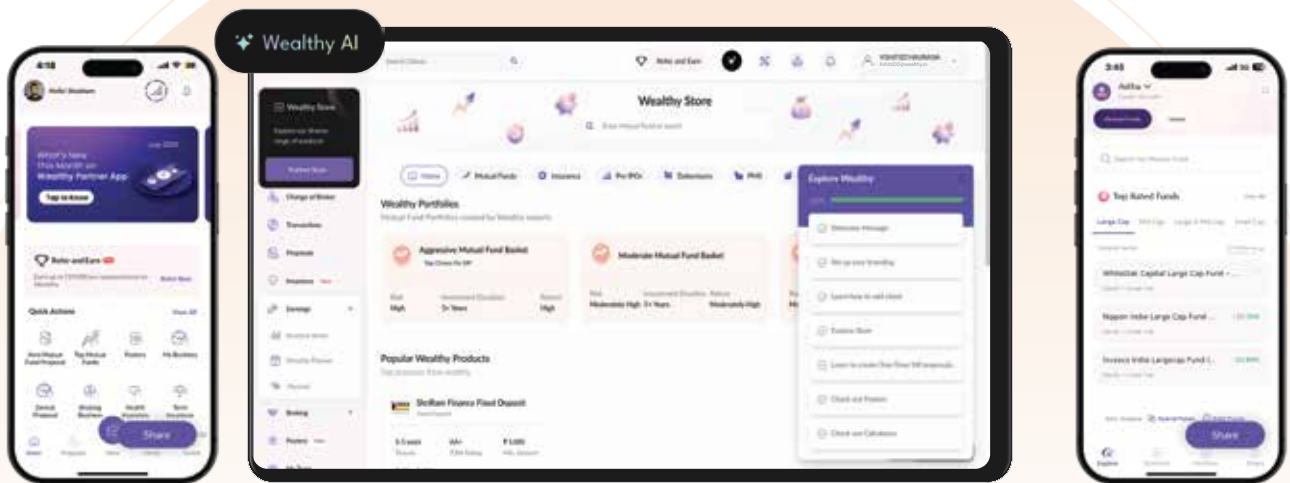


Wealthy helps MFDs grow fast. How?

01

Digital Ecosystem

- ✔ Full desktop functionalities on Wealthy Partner App
- ✔ Quick & Paperless KYC



Wealthy Partner App

Desktop Platform for Partners & Clients

Wealthy App for Clients

02

Research Updates

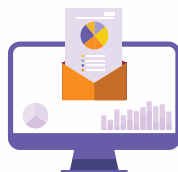
Because information is power, we help you make more informed decisions for your clients.



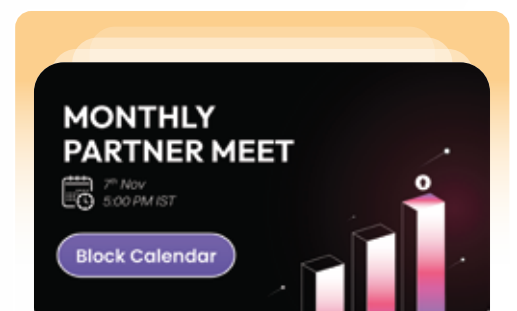
Daily Market Update



Weekly Newsletters

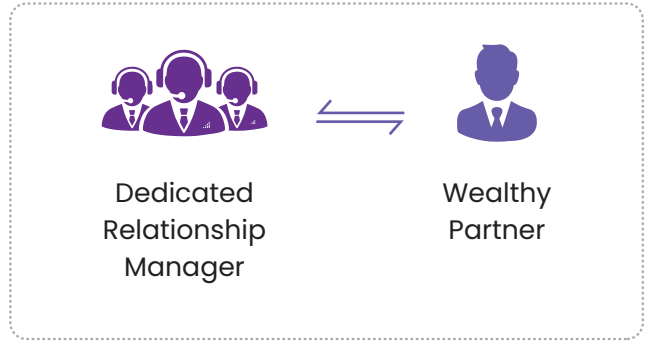


Monthly Partner Meet – Market analysis & more



Operational Support

You are supported by a dedicated Relationship Manager who assists with client servicing, keeps you informed about new features and available financial products and helps resolve queries and transactions efficiently.



Marketing Support for Client Acquisition



Personalised Brochures to showcase available products



Client investment awareness decks in multiple languages



Branded Website with logo, photo & services information for onboarding new clients



Digital Visiting Card



Marketing Poster in multiple languages with your branding



Priya K
Thane
Wealthy Partner



I use Poster Gallery frequently for my WhatsApp status & I have received quite a few enquiries from there.

Learning and Development

wealthy
LAUNCHPAD

9 focused sessions designed to help you start your MFD journey with confidence

wealthacademy

Strategy sessions and webinars with industry experts



The 100 Cr Club conversations with MFDs who have built ₹100+ Cr in AUM



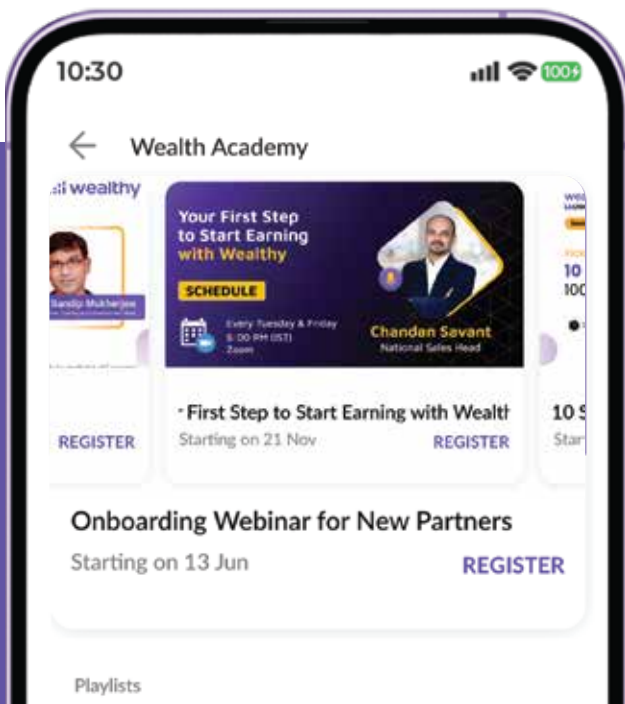
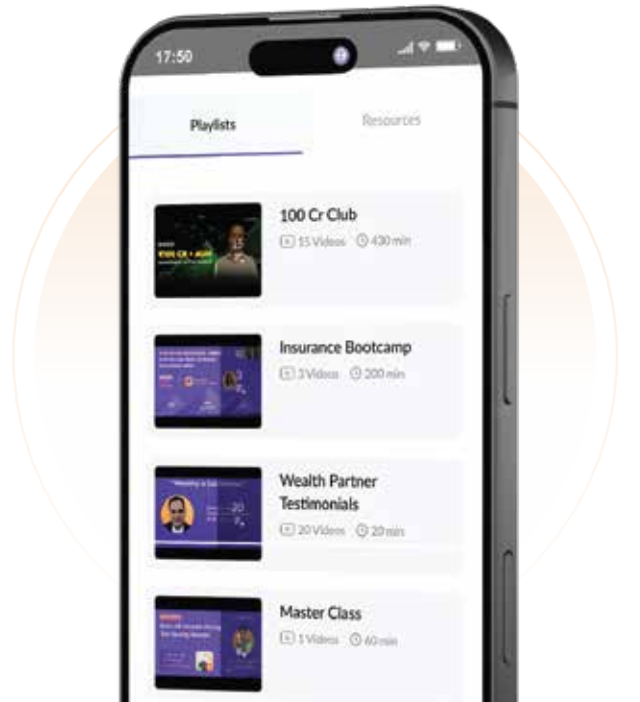
NISM Training - VA & XIII Live video lectures with study material & mock tests

welocity

Annual Knowledge summit for select partners

LEARNING SESSIONS

Access sessions on various topics on the partner app



Wealth Academy



Get everything you need to launch your MFD business - in just 3 days

3rd Day

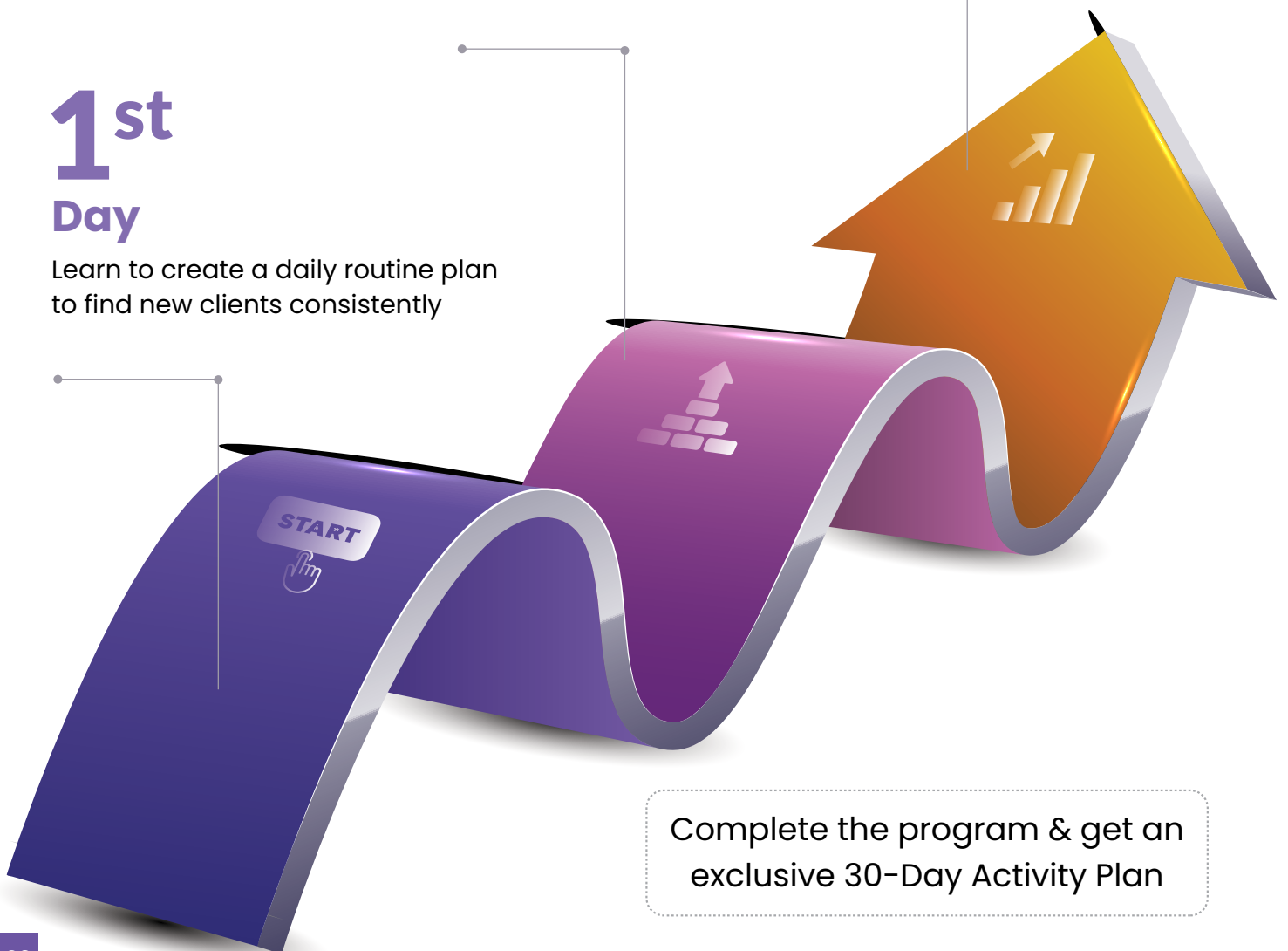
Learn to turn client interest into real opportunities

2nd Day

Learn to unlock 1 Lakh monthly income as an MFD

1st Day

Learn to create a daily routine plan to find new clients consistently

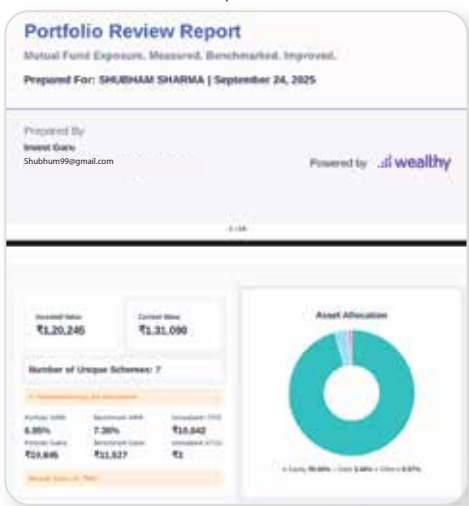
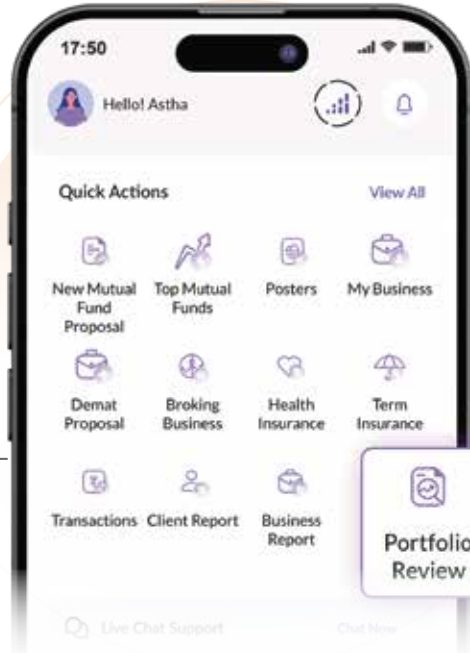


Complete the program & get an exclusive 30-Day Activity Plan

Revolutionary industry-first features

Exclusive AI tool

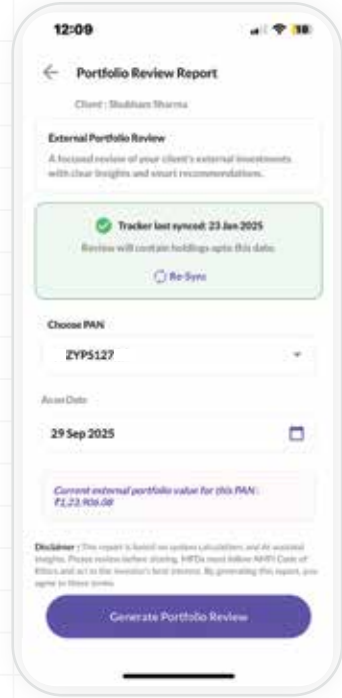
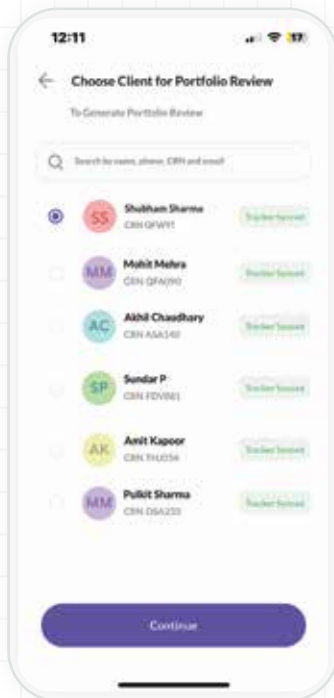
Whip up a quick **portfolio review**, check client's financial health & unlock new business in minutes with AI



Evaluate every client portfolio like an expert

Aditya K Noida
Wealthy Partner

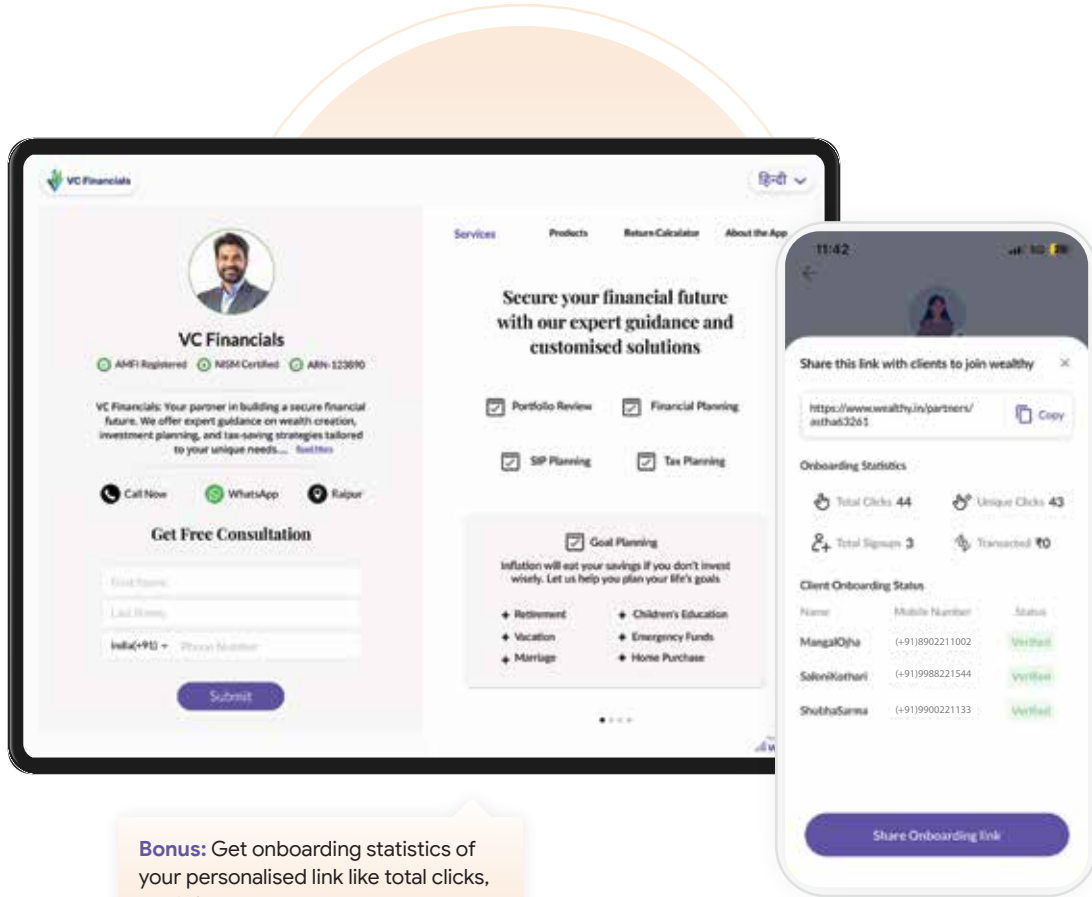
“
The portfolio review shows a lot of information that can be really used to optimise the client's portfolio & help with goal planning. The report is also shared in a professional way.



Branded Client Onboarding Website

Impress clients with your own webpage.

Add your logo, photo, tagline and contact. Available in 9 languages, your page comes with an inquiry form. Every lead is synced to your dashboard, with email and WhatsApp notifications sent to you.



Bonus: Get onboarding statistics of your personalised link like total clicks, total signups, status etc

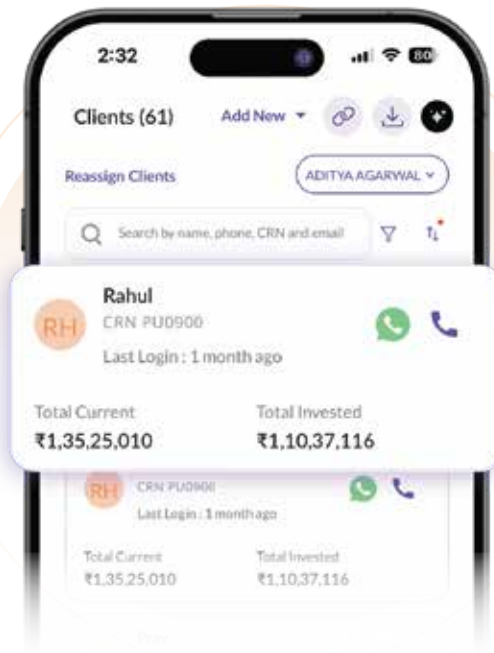
Client Management

Easily manage all your clients in one place. Filter by investment metrics & more.

A client profile card for Gursimar Faridkot, a Wealthy Partner. It includes a circular profile picture of a man with a beard and a turban. Below the photo is the name 'Gursimar Faridkot' and the title 'Wealthy Partner'. A quote is displayed below the profile: 'The client onboarding is so seamless that in the first meeting I completed the client's KYC and set up their SIP in just 10-15 minutes'.

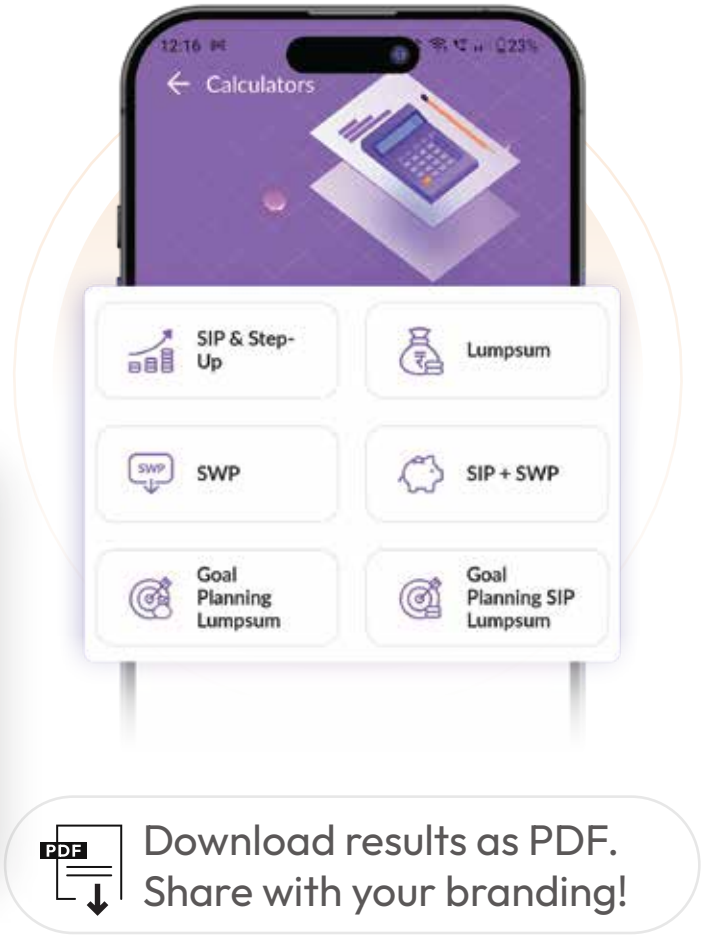
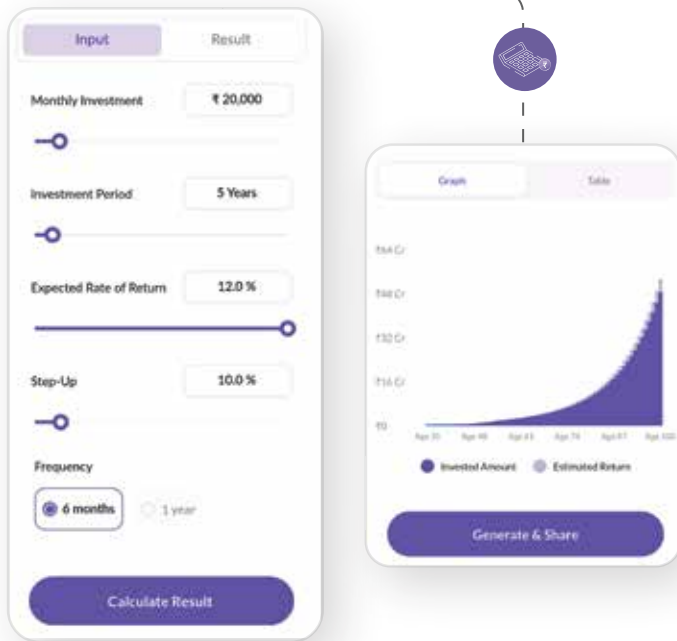
Gursimar Faridkot
Wealthy Partner

“
The client onboarding is so seamless that in the first meeting I completed the client's KYC and set up their SIP in just 10-15 minutes



Wealthy Calculators

All essential calculators in one place
SIP, Step-up SIP, Lumpsum, SWP,
Goal Planning & more



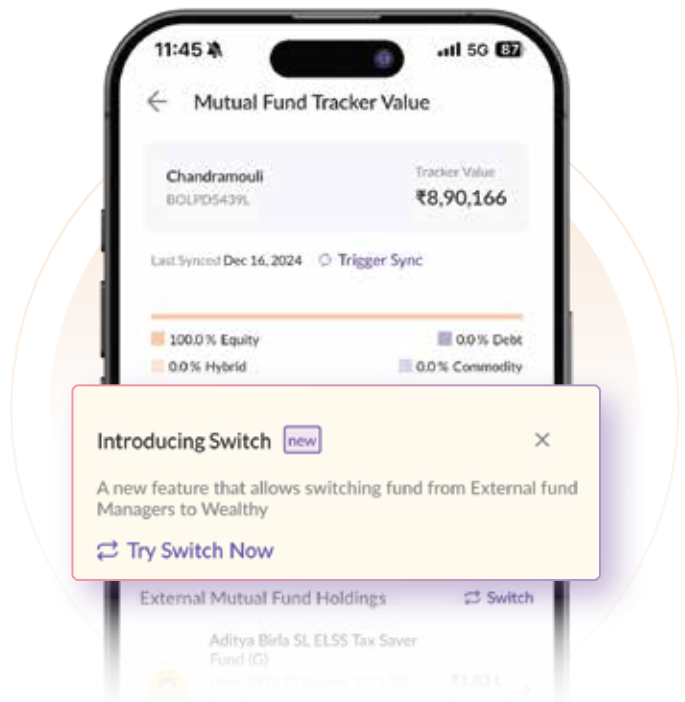
Tracker & Switch

Monitor clients' external investments
& seamlessly switch funds.



Vikram R
Chennai
Wealthy Partner

Tracker & Switch feature has been a game-changer for me in understanding investor behavior and personalizing their portfolios.

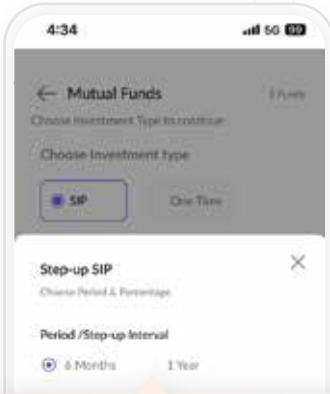


SIP features

The best in the industry. SIPs build your clients' wealth and your business.

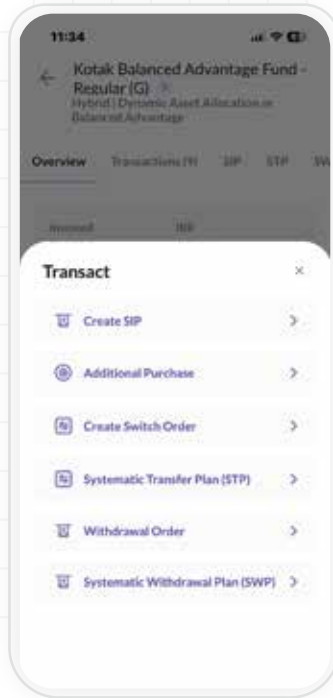
Step Up

Auto-increase SIP amounts over time.



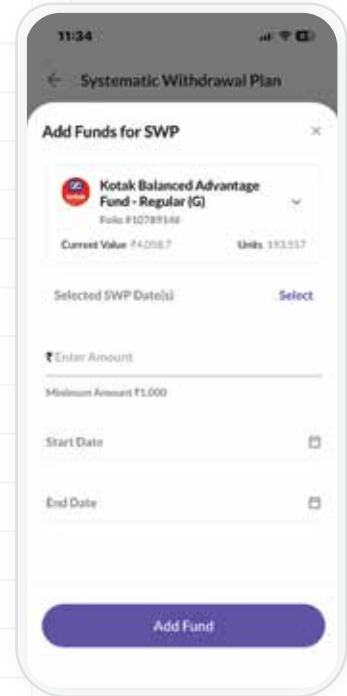
STP

Instantaneously shift from one scheme to another



SWP

Allow clients to withdraw money from a fund at set intervals



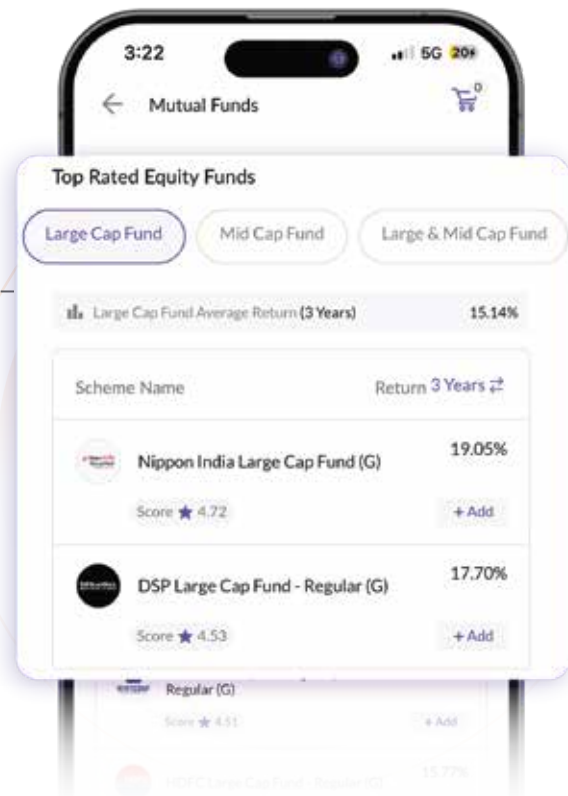
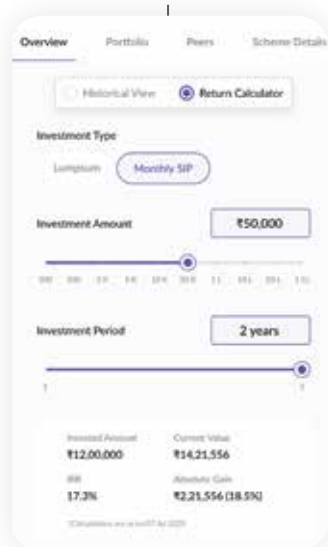
Nikhil S Shillong
Wealthy Partner



When we run goal-oriented planning for investors, we advise them to incorporate step-up right from the start. It makes long-term planning much easier & effective.

WealthySelect

Our ratings system to identify top-performing funds.



Introducing Wealthcase

Curated equity baskets by SEBI-registered RIAs.



What is Wealthcase?

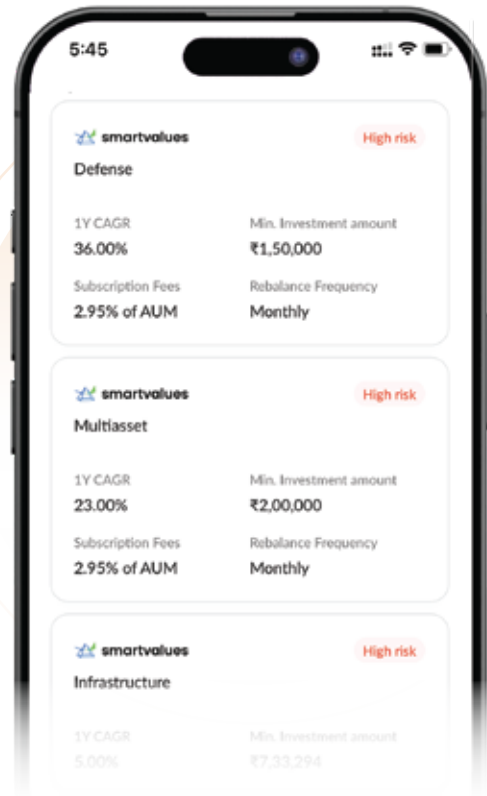
It's like an investment playlist, pre-curated stock basket built by experts.



Sushant B Sikar
Wealthy Partner



Wealthcase has helped my mutual fund clients explore & invest in the stock market.

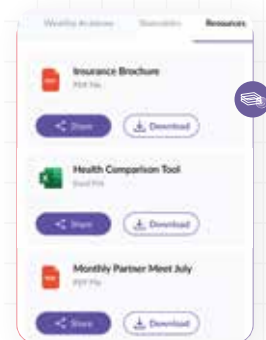


**Built for your clients.
Powered by you.**

Advanced Features

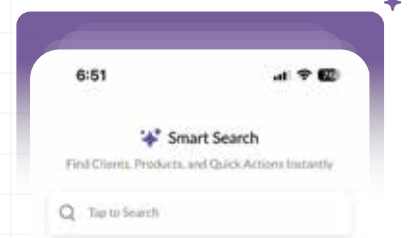
Resources Section

Easily access free resources like comparison tools, pitch deck & more



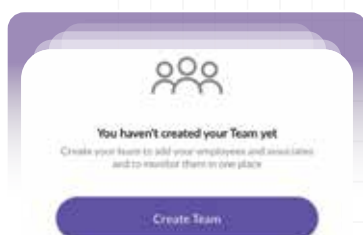
Smart Search

An intuitive search experience with intelligent filters for quick access to clients, products & features



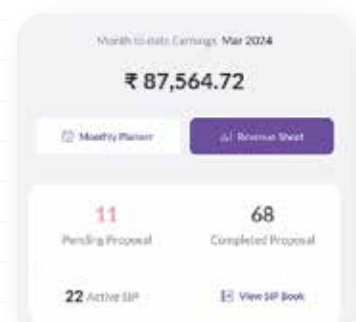
My Office

Create your team to add your employees & monitor them in one place



Business Dashboard

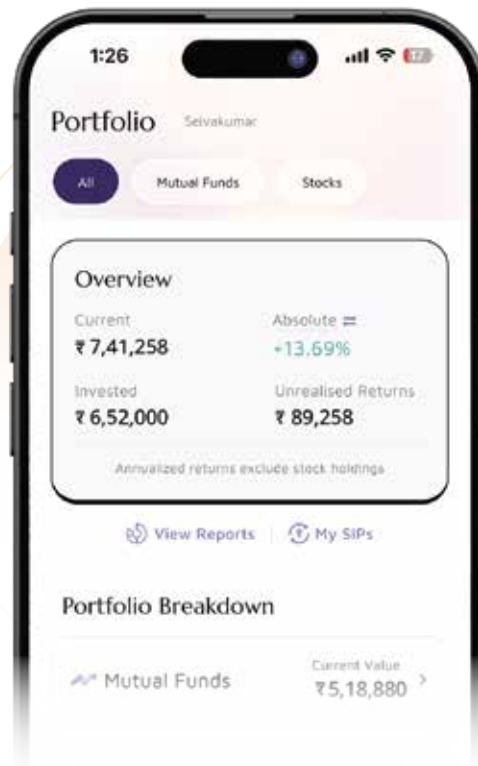
Track your earnings at product and client level easily on the partner



Advanced Client App

Give your clients everything they need in **one powerful app.**

Wealthy becomes their one-stop platform where they can manage their portfolio and invest in stocks, mutual funds, Pre-IPOs, ETFs, FDs, bonds and more.



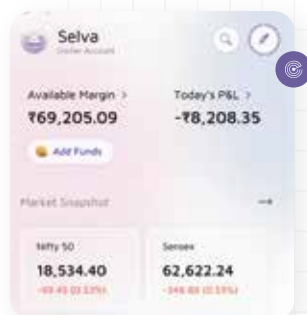
92% KYC completed without partner intervention.

Complete KYC

Full KYC journey available on the app with digital document collection and verification.

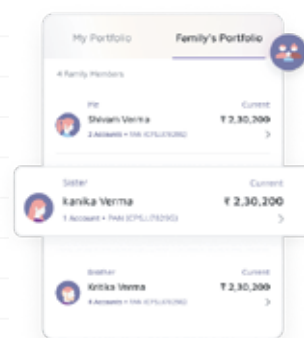
Stock Trading

Best in class trading app for your clients



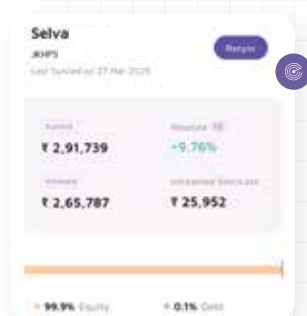
Family Portfolio

Enable clients to add and manage family members' investments under one view



Investment Tracking

View all your external investments in one place



Portfolio Reports

Get tailored, portfolio-level insights to stay informed



Why Wealthy stands apart. Perspectives from industry leaders



Swarup Mohanty
Vice Chairman & CEO, Mirae Asset
Investment Managers (India)

“

Wealthy is a forward-thinking platform. Its product research is “ahead of a lot” in the market.



Aashish Sommaiya
Executive Director & CEO,
WhiteOak Capital Management

“

I'm sure in the coming years Wealthy is going to play a big role in revolutionizing the reach of capital market products.



Avinash Satwalekar
President, Franklin Templeton Asset
Management (India)

“

Wealthy has done an incredible job to connect partners with investors & AMCs & build that bridge through tech.

A Firm You Can Trust

Wealthy is a Bengaluru-based firm with 20+ offices across India. Founded by IIT and IIM alumni, Wealthy is focused on using technology and financial services to help MFDs and financial product distributors grow their business and simplify their day-to-day work.

Awards & Recognition



Top 100 of the world's most innovative WealthTech firms



Fintech Scaup of the Year



Best WealthTech platform



Outstanding WealthTech Platform



Prashant Gupta

Co-founder

- IIT Madras, IIM Ahmedabad
- Ex-Morgan Stanley



Aditya Agarwal

Co-founder

- IIT Bombay
- Ex-Monitor Group



Somit Srivastava

Chief Technology Officer

- Ex-OLA



Jaya Singh

Chief Strategy Officer

- Ex-Citibank



Niharika Tripathi

Head of Products & Research

- Ex-Citibank



Chandan Savant

National Sales Head,
Digital Business

- EX-HDFC & Axis AMC



Ujjwal Banerjee

National Sales Head,
Branch Business

- Ex-NJ & Prudent



10,000+

Wealth Partners
trust us



₹ 5,000+ Cr

of Assets Under Management



300+

Employees



30+

Offices &
Growing!

Locally Connected. Nationally Established.

📍 Mumbai-Vasai

No. 101 & 102, Ganpat Niwas Premises CHS Survey no. 16, Ambadi Road, Navghar, Vasai, Palghar, 401202

📍 Mumbai- Vashi

Akshar Business Park, Plot No-3, Sector-25, W-3075, Vashi Navi-Mumbai - 400703

📍 Kolkata

41, B.B Ganguly Street, Central Plaza, Unit No - 6C, 6th Floor, Kolkata - 700012

📍 Vapi

104, First Floor Arihant Complex, Near Fortune Mall, GIDC Phase 2, Vapi - 396195

📍 Lucknow

No.126/31,03-A 1st Floor, Shalimar Square, B.N Road, Lalbagh, Lucknow - 226001

📍 Prayagraj

Third Floor, Vinayak Tower, 28-B Civil Station Prayagraj. Present municipal number 124E/20 M.G. Marg, Prayagraj - 211001

📍 Mumbai-Borivali

No. 61, 6th floor, Om chambers, Final Plot No.209, TPS III, Taluka Borivali, 57th road, Borivali West, Mumbai - 400092

📍 Hyderabad

No. G-2, Bearing Municipal No. #6-3-1085/D/G2, Dega Towers, Rajbhavan Road, Somajiguda, Hyderabad - 500082

📍 Ahmedabad

Sspacia, 4th Floor, Agarwal Complex, Near Municipal Market, C.G. Road, Ahmedabad - 380009

📍 Jaipur

NO-501, Plot No-5, 8th Floor, Unit -801, Okay plus Tower, Hathroi Road, Ajmer Road, Jaipur - 302001

📍 Varanasi

1st Floor, Anant Complex, Ward-Dashaswamedh, Siga, Varanasi - 221010

📍 Mumbai-Dadar

301, Vasant Vihar Co-op. Housing Society Limited, Dadasaheb Phalke Road, Opp. BJP Office, Dadar East, Mumbai - 400 014

📍 Delhi

No. 801, Mercantile House,15 Kasturba Gandhi Marg, New Delhi - 110001

📍 Surat

405, 4th Floor, Milestone Acropolis, Ambika Niketan, Athwa, Surat - 395007

📍 Faridabad

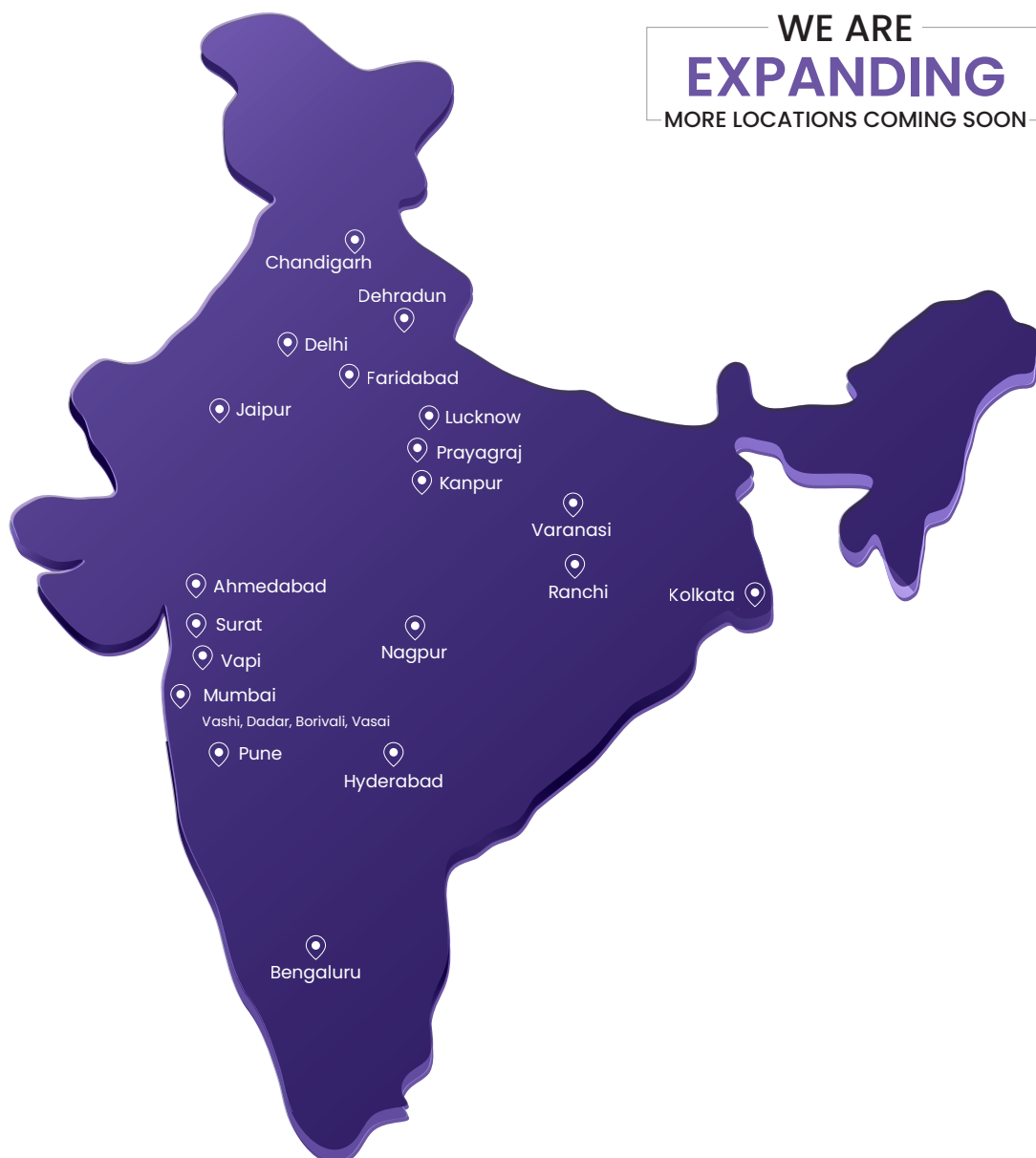
No 43, First Floor, Sector-19, Part II, Huda Market, Faridabad - 121002

📍 Kanpur

16/34 Sai Arcade, Bhargava Estate, Civil Line, Kanpur Nagar - 208001

📍 Dehradun

No - 4, Wealthy, North Avenue, First Floor, 9/8, Chakrata Road, Behind Indian Oil Filling Station, Dehradun - 248001



WE ARE
EXPANDING
MORE LOCATIONS COMING SOON

India's leading AI-enabled platform for mutual fund distributors & financial product distributors

Download Wealthy Partner App



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.

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

 partner.support@wealthy.in

 www.wealthy.in

 wealthy