KAUTILYA CAPITAL MANAGEMENT

CHINMAY NAIK
SEBI Registered Investment Adviser

Kautilya Capital Management

KCM INVESTMENT ADVISORY – MISSION

- ✓ Empower Clients to make **Informed Investment Decisions** through Goal-based Planning
- ✓ Help Clients achieve **Financial Goals** across Life Stages through appropriate **Asset Allocation**
- ✓ Maintain Highest Standards of **Integrity** and **Fiduciary Responsibility** towards Clients

FOUNDER PROFILE – CHINMAY NAIK

- ✓ **Chartered Accountant** (ICAI), **Investment Adviser** (NISM, SEBI)
- ✓ Partner at **K C Mehta & Co LLP**, Chartered Accountants
- ✓ **15 years** in Financial Due Diligence, Corporate Finance, Investment Research

SEBI REGISTERED INVESTMENT ADVISER

- ✓ **Fee-only Independent Advice** based on Investor Risk Profiling
- ✓ **No Sales Commission** on any Financial Product
- ✓ Complete Transparency, **No Conflict of Interest** or Product Bias
- ✓ **SEBI Regulated**, Periodic Audit & Compliances

OUR APPROACH TO INVESTMENT ADVISORY

- ✓ **Investment Policy Statement** based on Investor-specific Risk Profiling
- ✓ Investment Advice based on thorough **Research, Knowledge & Experience**
- ✓ **Holistic Financial Planning**, Goal-based Investing & Asset Allocation Advice
- ✓ Periodic Portfolio **Review, Monitoring & Rebalancing**
- ✓ **Cashflow Budgeting** & Tracking: Differentiating Investment from Expenditure
- ✓ **Life Stage Planning**: Early Stage Investor, Higher Education, Wedding, Children, Buying House
- ✓ **Retirement Solutions**: Financial Independence, Succession & Estate Planning^
- ✓ **Risk Assessment**: Insurance Planning^, Debt Management, Taxation Advice^, Behavioural Coaching^
- ✓ **Family Office**: Operational Support^, Wealth Management, Succession Planning^, Residency & Taxation^

SEBI Registration No.: INA000021252 | **BSE Enlistment No.:** 2357
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SEBI REGULATED FINANCIAL PRODUCTS FOR ADVICE

- ✓ Listed Securities: **Shares, Bonds, Debentures, ETFs**
- ✓ All Categories of **Mutual Funds**
- ✓ Real Estate Investment Trusts (**REIT**) & Infrastructure Investment Trusts (**InvIT**)
- ✓ Portfolio Management Service (**PMS**) & Alternative Investment Funds (**AIF**)

OTHER FINANCIAL PRODUCTS FOR ADVICE

- ✓ **Fixed Income** Investments & Small Savings Schemes (e.g., FDs, NCDs, Bonds, PPF, SCSS)^
- ✓ **Pension** Products: Employees Provident Fund (EPF) ^, National Pension System (NPS) ^
- ✓ **Insurance** Plans: Term Insurance^, Health Insurance^, Vehicle Insurance^, Property Insurance^
- ✓ **Global Investments**: Inbound & Outbound Equities & Mutual Funds^, GIFT City Funds^
- ✓ **Alternate Investments**: Investment in Startups^, Private Credit^, ESOPs^
- ✓ Real Estate^ & Commodities^: **Asset Allocation Advice**
- ✓ **Loan & Credit Management**: Home Loan^, Vehicle Loan^, Personal Loan^ / Credit Cards^

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