MENSA

MENSA INVESTMENTS

Uniquely Capable | Fiercely Loyal

Who we are

Who we are

MENSA INVESTMENTS HOLDING LTD.

Mensa Investments Holding Ltd. is a dynamic and diversified holding company with a strategic focus on the wealth management and private banking sector. As a parent company, Mensa Investments Holding Ltd. owns and manages a portfolio of the below subsidiary companies, each specialising in various aspects of financial services and investment management.

Mensa Investments Corporation (DIFC) Ltd.: Our wealth management and private banking subsidiary is dedicated to providing high-net-worth individuals, families and institutions exclusive, personalised financial services. With a team of experienced advisors, it offers comprehensive services, including investment advisory, financial planning, asset management and a range of solutions, including portfolio management, estate planning, and access to bespoke investment opportunities.

Mensa International Real Estate LLC: Our real estate brokerage arm provides clients with comprehensive real estate services, including the buying, selling and leasing of property. This complements our existing private banking and wealth management services by addressing clients' real estate needs.

Mensa Mortgage Broker LLC: Our mortgage brokerage division offers mortgage solutions to both individuals and corporates. This venture enhances our service portfolio by facilitating real estate financing.

Expansion into New Ventures: Our strategic expansion into new verticals such as FX Solutions, Structured Product Distribution, Asset Management and Alternative Investments is rooted in our commitment to providing our clients with comprehensive financial solutions.

We believe that by diversifying our portfolio and embracing innovation, we can better serve our clients' evolving needs and offer a holistic approach to wealth management and financial services.

Who we are

MENSA INVESTMENTS (DIFC) LTD.

A leading Independent Asset Manager, MENSA Investments is incorporated in and operates from the prestigious and strategically positioned **Dubai International Financial Centre (DIFC)**. We are a Financial Institution – an authorised Category 3C Licensed Entity regulated by the DFSA (Dubai Financial Services Authority).

Run by a team of experienced Private Bankers with multi-decade expertise in Private Banking and Wealth Management, we provide **exceptional investment advice, wealth and financial planning solutions**. The collective expertise of our team of true-blood, private bankers are alike not just in capability but also in their performance mindset, inspiring our clients' confidence. We are constantly seeking hidden opportunities as evidenced in our logo, which harnesses the coiled power and potential of a tiger and dragon.

Our **'open architecture' model** serves both high-net-worth Private and Institutional clients, with the highest standards of excellence. With us, our clients enjoy **class-leading Independent Wealth Management and External Asset Management services**, bolstered by the expertise you expect from a Multi-family Office.

Our core business activities include:

1. Managing Assets
2. Arranging Custody
3. Advising on Financial Products
4. Arranging Deals in Investments
5. Arranging and Advising on Credit

Incorporated in	DIFC – Dubai International Financial Centre
Regulated by	DFSA – Dubai Financial Services Authority
Category of Licence	Category 3C
Internal Auditor	NexDIGM Consulting Limited
External Auditor	KPI Ahli Chartered Accountants

What we stand for

What we stand for

TO REDEFINE CLIENT RELATIONSHIPS – FROM TRANSACTIONAL TO TRANSFORMATIONAL

Our company was built on the ideals of **independence, integrity** and the **conviction that true relationships never cease**.

Our principle is to move away from superficial, one-off interactions with clients and instead aim for a more profound, long-lasting relationship that transforms their experience and outcomes. It's about shifting from a purely business-centric approach to one that is more client-centric and focused on mutual growth and development.

At MENSA Investments, our approach emphasises a **deeper and more holistic relationship with our clients**. It goes beyond individual transactions and seeks to create meaningful and ongoing connections. **The goal is to help them achieve their objectives** and undergo positive changes through our independent and 'open architecture' services.

Here's what we truly stand for:

- **To be fiercely loyal to you** – and not to anyone else's agenda
- **To uphold transparency as an uncompromising value** – it's the only thing that builds trust
- **To use our individual and collective talents** – to cover your interests deep and wide
- **To use powerful technology** – to change the game to your advantage
- **To help you handcraft your financial legacy** – as if it were our own
- **To keep your goals front and centre** – because when you achieve yours, we achieve ours

YOUR TRUSTED PARTNER

What does **trust** mean to you?

Is it **reliability** and **expertise**, hard-won through **decades of private banking experience** for each of our team members?

A **truly independent asset management strategy** that ensures we **constantly work for you** instead of a vested corporate interest, enabling genuine diversification for your wealth on a global scale?

A **rationalised cost structure** devoid of commissions, surcharges or hidden fees?

An **infrastructure** that is both **physical**, with 4,000 square feet of office space in the DIFC, one of the premier financial hubs in the MEASA region, and **technological**, through an app developed abroad to give you real-time consolidated cash positions?

Or the **discretion** that you expect and deserve, when it comes to your hard-earned wealth?

To us, it's all of the above, and more.

While managing your assets, we understand that trust is sacrosanct. Which is why we take the time to meet with you to understand your goals, aspirations and plans for the future. We then carefully chart a roadmap for your assets, ever mindful of your risk appetite and financial objectives. From there, we monitor, track, rebalance and highlight your progress, with transparency at every stage, keeping the control always in your hands.

Welcome to a **new paradigm** in Independent Asset Management.

OUR CULTURE AND CORE VALUES

Since inception, we've been guided and governed by a set of core values that we consistently embody, every single day:

- **Fierce loyalty** – we are, first and foremost, faithful to you and your ambitions. Epitomised by our unwillingness to compromise when it comes to finding the right-fit products and investments, we are always passionately protective of your interests.
- **Future focus** – with technology comes transparency. In the financial sphere, it also enables speed and better decision-making, providing both broad and granular insights. Our wealth tech capabilities can aggregate a multi-bank portfolio for you all in one place, accessible with a single click.
- **Crystalline transparency and trust** – transparency is what defines us as truly Independent Asset Managers. Whether thoughtfully selecting a basket of assets via an 'open architecture' investment platform, expertly rebalancing your portfolio, intelligently arranging credit or providing unbiased advice, we are clear about our approach and the intended outcomes, earning your trust through our performance.
- **Reassuring confidence** – the collective expertise of a team of true-blood private bankers alike not just in capability but in their performance mindset, inspires confidence in clients, as does our strict regulation by the DFSA. Unfettered by the limitations of banks, and with wholehearted dedication to your goals, we listen before prescribing a definitive way forward with clarity and precision.
- **The gold standard** – our sights are set on becoming the de facto aspirational benchmark for external and independent asset management in the Middle East. We have the talent, foresight and resources to raise the bar several rungs higher, to institute unprecedented standards across the region, and to be the standard bearer in the DIFC.

WHY OPT FOR MENSA?

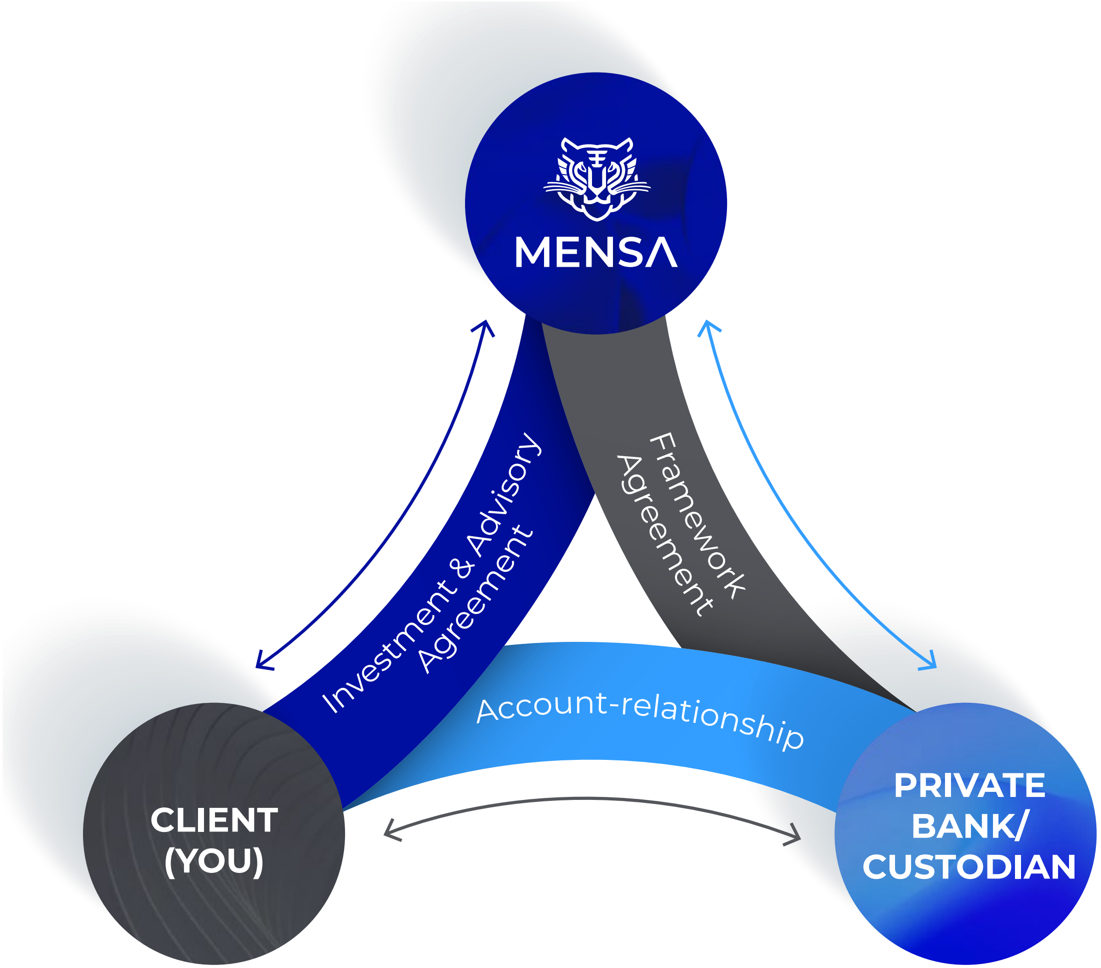
MENSA is a leading Independent Asset Manager incorporated in the DIFC and authorised and regulated by the Dubai Financial Services Authority (DFSA).

The abbreviations IAM (Independent Asset Managers), IWM (Independent Wealth Managers) and EAM (External Asset Managers) are used interchangeably.

Independent Asset Management is wealth management the way you know and trust with your private banker – but unfettered by the limitations of banks to **provide unbiased, greater value for you**. We work outside of the remit of a private bank or traditional financial institution. Independence means we act impartially and with neutrality – we are financial institution-agnostic, which allows us to offer our clients the best possible wealth management strategies from a wide range of diversified investment instruments. This means **no conflicts of interest**, ever.

We **align our interests entirely with your goals and objectives**, as a trusted advisor that understands your unique asset and liability context and current multi-custody relationships. We are strongly **relationship-oriented and advisory-driven**. Our team supports you by simplifying your wealth management arrangements, while complementing the relationship with your current custody bank(s) with consummate expertise and investment strategies.

HOW DOES MENSA WORK?



A question we commonly hear is, **"How will MENSA and private banks work together for my benefit?"** Our answer is a relationship based on a simple, tried-and-tested, transparent business model, best represented by a triangle:

- Your Private Wealth Advisor (representing MENSA Investments, the IAM) takes the time to meet with you to understand your **goals, aspirations and plans for the future**
- Your Private Wealth Advisor helps select the **ideal custodian banks** for safekeeping of your assets
- As the custodians of your assets, the selected banks provide custody and execution services
- Your Private Wealth Advisor then carefully **charts a roadmap for your assets**, mindful of your risk appetite and financial objectives, and handcrafts an investment strategy
- Your Private Wealth Advisor works with custodians to implement the investment strategy, incorporating high-quality products and services on a global level
- You sign a 'limited power of attorney' enabling the IAM only to trade on your behalf (without any direct access to your funds)
- With total transparency and flexibility, both MENSA Investments' and the custodian banks' online services provide you with **access to your accounts 24/7**

OPEN ARCHITECTURE

How our 'open architecture' framework translates to more effective investments for you:

- We maintain relationships with multiple custodians, primarily **top-tier global private banks**, to provide you with global custodian arrangements
- Your Private Wealth Advisor helps choose and open an account with the ideal custodian/bank for safekeeping of your assets, directly in your name
- We operate through multiple global booking centres **(Switzerland, Singapore, London, UAE, etc.)** and with multiple issuers, research houses, fund managers and financial institutions, to provide you with access to world-class solutions
- Unlike a private bank, we are not restricted to a single house view, and our access to multiple research reports opens up more promising avenues for investments – think of us as your in-house Chief Investment Office
- You benefit from our **independent investment expertise that helps you to stay ahead,** while your assets remain at the bank of your selection

YOUR BENEFITS WORKING WITH MENSA

- **No Conflict of Interest** – Your Private Wealth Advisor operates without any competing or conflicting motivations that could compromise their ability to act solely in the best interests of their clients. This commitment ensures transparency, objectivity, and the prioritisation of client welfare in all investment decisions and financial strategies.
- **Independent Advice** – After conducting a thorough assessment, we prioritise delivering advice solely in the best interests of our clients, ensuring transparency and personalised solutions tailored to individual financial goals.
- **Bespoke Service** – We customise portfolios that are specifically designed to meet the unique and individual needs of a particular client by considering factors such as age, risk tolerance, investment experience, and personal preferences.
- **Consolidated Reporting** – We provide comprehensive and centralised presentation of a client's financial information. This approach streamlines and integrates data from multiple banking relationships, providing clients with a unified overview of their investment portfolios, performance, and financial status. This consolidated reporting ensures transparency, accessibility, and a holistic understanding of our clients' financial positions.
- **Favourable Bank Conditions** – MENSA clients benefit from favourable banking conditions as we leverage our relationships with top-rated global private banks to optimise financial strategies, ensuring our clients benefit from the most advantageous banking arrangements for their investment portfolios and financial goals.
- **Speed** – We have full access to the bank's in-house securities trading system, which means trades placed by MENSA enjoy the same execution speed as trades placed by the bank.
- **Structure** – We have a well-organised framework and operational design that underpins our client-centric approach. Our structural integrity ensures streamlined processes, efficient decision-making, and a responsive environment for managing investments. With a robust and flexible structure, IAMs are poised to adapt swiftly to market dynamics, providing clients with a secure foundation for their financial goals.
- **Specialist Expertise** – We bring a focused and specialised understanding of niche markets, asset classes, and investment strategies. This expertise allows us to offer informed guidance, ensuring that your investment portfolio is strategically positioned to capitalise on opportunities and navigate challenges within these specialised domains.
- **Continuity over Time** – Your dedicated Private Wealth Advisor is a lifelong partner with their own succession factored in, providing stability and peace of mind for your financial needs, even across generations.
- **Cost Efficiency** – IAMs often have a leaner operational structure, leading to potentially lower fees for clients compared to traditional private banks that may have higher overhead costs. Clients may benefit from cost-effective services without compromising the quality of financial management.

WHAT WE DO

- Arranging Custody
- Managing Assets – Investment Advisory
- Advising on Financial Products
- Arranging Deals in Investments
- Arranging and Advising on Credit

ARRANGING CUSTODY

At MENSA, we prioritise the security and responsible management of our clients' assets. As an Independent Asset Manager (IAM), we understand the importance of partnering with reputable custodians to ensure the safekeeping and efficient administration of your investments.

What is "Arranging Custody"?

Arranging custody involves the careful selection and management of a custodian, a trusted financial institution responsible for holding and safeguarding your securities and assets. As an IAM, we do not physically hold your assets but collaborate with established custodians to provide a secure and transparent environment for your investments.

Our Approach

Client-centric Selection: We work closely with you to choose a custodian that aligns with your unique financial goals, preferences, and risk tolerance. The selected custodian plays a crucial role in the overall management of your portfolio.

Reputation and Expertise: We prioritise custodians with a proven track record, strong industry reputation, and a commitment to the highest standards of security and service. This ensures that your assets are in capable hands.

Transparent Processes: We believe in transparency in every aspect of our services. Our clients have full visibility into custodial arrangements, allowing for peace of mind and clarity regarding the management of their investments.

Why Custody Matters

Security: Custodians provide a secure environment for your assets, reducing the risk of loss or unauthorised access.

Efficiency: Custodians handle the day-to-day administrative tasks, such as trade execution and reporting, allowing us to focus on strategic investment decisions tailored to your financial objectives.

Accountability: The arrangement of custody establishes a clear division of responsibilities, providing accountability and transparency in the management of your financial assets.

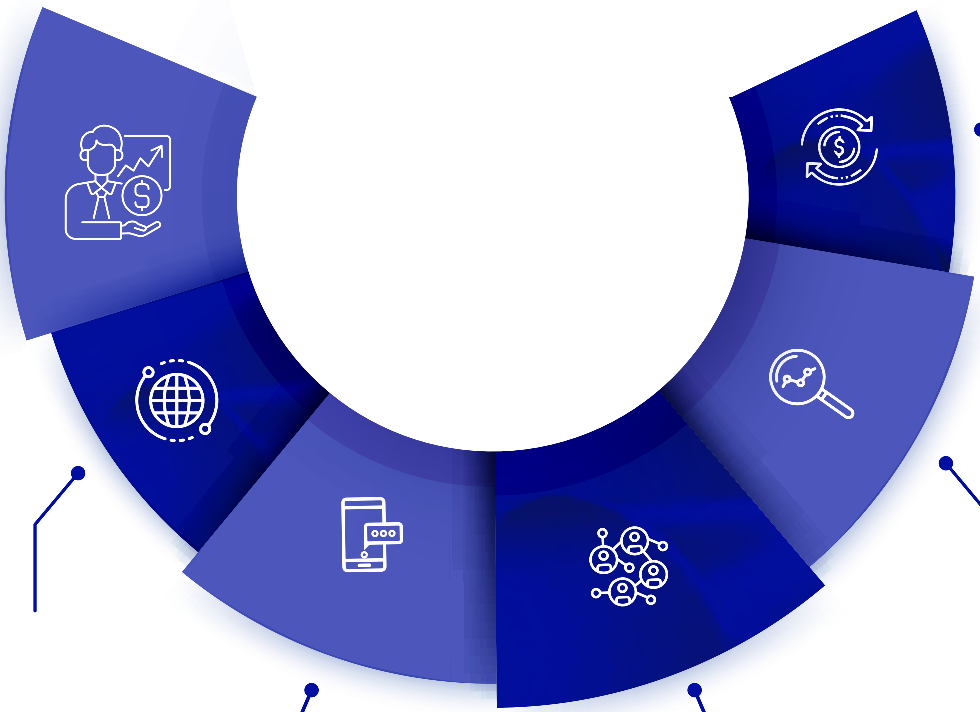
MENSA ADVICE

MENSA's Investment Advisory Services stand as the bedrock of strategic wealth management, **designed to empower you on your financial journey**. As our valued client, you can expect a partnership that bridges your financial dreams with the guidance of seasoned experts. We take a personalised approach, crafting investment strategies that are tailored to your unique financial goals and risk profile, ensuring your portfolio is optimised for success. Our services extend beyond mere portfolio management, to encompass comprehensive financial planning, risk assessment, and asset allocation. By choosing MENSA, you gain access to a team of experts committed to your financial well-being. It's time to make informed, strategic investment decisions and pave the way for your financial future with MENSA's Investment Advisory Services by your side.

As our client, you have complete authority over all investment choices, bolstered by the expertise of our skilled advisors. In essence, **we provide guidance, while you hold the final decision-making power.** Leveraging our broad coverage of multi-assets from top financial institutions, we tailor a meticulous and timely strategy, addressing your risk tolerance and meeting your investment goals.

Charting Your Financial Journey, Together

THE MENSA CLIENT JOURNEY: YOUR VISION, OUR DEDICATION



Initiating the Process

Your Private Wealth Advisor starts by meeting you to gain insights into your objectives and financial aspirations

Understanding Your Goals

After the initial meeting, your Private Wealth Advisor thoroughly comprehends your financial goals, risk tolerance, and objectives. This forms the basis for the next steps.

Creating a Tailored Investment Strategy

Taking your financial goals and risk appetite into account, your Private Wealth Advisor carefully constructs a customised investment strategy

Choosing Ideal Custodian Banks

Your Private Wealth Advisor helps you select the ideal custodian banks responsible for safekeeping your assets. You can also choose from various Tier 1 booking centres – Switzerland, Singapore, London, UAE, etc.

Implementation of the Investment Strategy

Working closely with the Custodian banks, your Private Wealth Advisor puts the investment strategy into action, utilising high-quality global products and services

24/7 Account Access

You benefit from full transparency and flexibility through MENSA Investments and the custodian banks' online services, enabling you to access your accounts at any time

INVESTMENT SERVICES – OUR APPROACH

Our approach to advising you on your investments follows a systematic process that involves a thorough understanding of your needs, a portfolio constructed with carefully selected products, periodic reporting and regular rebalancing.

ASSET ALLOCATION

Client Profiling

A detailed understanding of your investment goals, both present and future cash flow requirements, along with a comprehensive understanding of your individual risk tolerance, knowledge and experience, constraints, and preferences

Portfolio Construction

We construct your portfolio by meticulously curating a well-diversified blend of investment products across various asset classes. This includes carefully selected mutual funds, individual stocks, and bonds, as well as custom-tailored structured financial solutions.

Portfolio Reporting

We provide regular, comprehensive 360-degree reporting, continuous monitoring, and in-depth analysis of your entire financial relationship with us

Portfolio Review

We conduct regular reviews and rebalance your portfolio to align with evolving market conditions, your individual risk tolerance, cash flow needs, and our strategic and tactical asset allocation strategies

HOW IS YOUR INVESTMENT STRATEGY FORMULATED?

Strategic Asset Allocation dictates your ideal long-term positioning according to your individual investor profile (a combination of your financial context, risk tolerance and long-term objectives). Your Private Wealth Advisor will support you in picking the ideal investment strategy.

Tactical Asset Allocation Strategy

Tactical asset allocation is a dynamic investment strategy that adjusts portfolio weights based on short-term market conditions to optimise returns.

Portfolio Risk Position

Bonds	Under Weight	Neutral	Over Weight
DM IG Bonds		o	
DM HY Bonds	o		
EM IG Bonds	o		
EM HY Bonds	o		
Equities	Under Weight	Neutral	Over Weight
US EQ	o		
Europe EQ	o		
Asia EQ	o		
GCC EQ	o		
Cash			o

PORTFOLIO MONITORING

We continually track your portfolio against critical quality criteria to ensure its optimum performance

Risk mitigation

Tracking volatility at portfolio level against the risk thresholds defined by your risk appetite and chosen strategy, to avoid any divergences

Asset class allocation

Ensuring that the weightage of asset classes adheres to the thresholds defined by your chosen strategy, to keep long-term returns in line with expectations

Avoiding bulk risk

Making sure that your portfolio is well diversified, by alerting you if the allocation to a single instrument is excessive compared to your portfolio's overall value

Limiting issuer concentration

Making sure that your portfolio is well diversified, by alerting you if the allocation to a single issuer is excessive compared to your portfolio's overall value

SELL BUY

'Buy/Sell' recommendations

Notifying you in the event that any equity or bond instrument receives a rating of Buy, Sell, or Hold from research houses, is projected to underperform, or carries elevated risk in comparison to similar instruments

Lower-rated instruments

Identifying assets and instruments that expose your portfolio to excessive credit risk, according to our selected external rating agencies

Not monitored

Transparency about those investment instruments for which MENSA research does not provide any information, since it has not conducted any analysis on the instrument

INVESTMENT SOLUTIONS

Whether you seek to delegate your investment decisions or play a more active part, we offer **class-leading investment strategy and bespoke advisory services** to suit.

Today's markets are increasingly complex and unpredictable, continually exposing your capital to risk. Regardless of this volatility, you wish to mitigate risk exposure and earn a consistently positive return. At MENSA Investments, both our discretionary portfolio management and non-discretionary investment advisory solutions are designed to do just that.

As an Independent Asset Manager, we blend best-in-class products and proactive risk management to **handcraft solutions** aimed at avoiding sharp drawdowns, while maintaining consistent, long-term growth. This means we rapidly modify asset allocations in response to significant market shifts. And with **our success tied directly to yours,** it's in our own self-interest to always act in your best interest.

If you wish to make your own investment decisions, we serve as your trusted advisor. Based on your financial goals, we leverage our decades of asset management expertise and wealth of expertise to thoughtfully evaluate options, assess risk and offer guidance and support.

INVESTMENT PRODUCTS AND SERVICES

ARRANGING DEALS IN INVESTMENTS

Structured Product Issuers

At MENSA, we collaborate with reputable structured product issuers to bring you innovative and tailored investment solutions. Structured products offer a unique approach to investing, combining traditional financial instruments to meet specific risk and return objectives.

Investment Banking

Our financial advisory services involve arranging deals in mergers and acquisitions to capital raising, and strategic transactions for corporations and high-net-worth individuals. Our seasoned professionals are dedicated to maximising your returns and securing your financial success. Partner with us for a personalised approach to optimise financial outcomes and achieve strategic goals.

Private Market Deals

Our Private Market Deals service provides access to a curated selection of high-potential investments in private equity, venture capital, and private debt.

Art

Our specialised service in Art Deal Arrangement opens a realm of exclusive opportunities for collectors and investors alike. From acquiring rare masterpieces to facilitating art transactions, we leverage our expertise to curate unique deals tailored to your artistic and financial preferences.

ARRANGING DEALS IN INVESTMENTS

Insurance

We arrange insurance solutions provided by world class insurers/ underwriters – covering products across the spectrum, including universal life insurance, wealth transfer and legacy planning insurance.

Universal Life Insurance is a type of permanent life insurance that combines a death benefit with a cash value component. Universal Life Insurance offers greater flexibility to policyholders in terms of premium payments, death benefits, and the accumulation of cash value.

ARRANGING CREDIT AND ADVISING ON CREDIT

At MENSA, our advisory services encompass a comprehensive range, from conventional credit solutions to specialised offerings like portfolio lending, Lombard Lending, and financing for properties, yachts, and aircraft. With a keen understanding of each client's unique needs, we navigate the intricacies of credit arrangements, ensuring **a tailored approach that aligns with your financial objectives.** Whether it's securing credit for real estate ventures or financing high-value assets, trust us to orchestrate a seamless and strategic credit arrangement process.

Our seasoned advisors provide insights into optimal credit structures to assist you in selecting the most suitable financing options. With MENSA, navigate the world of credit confidently, supported by tailored advice that propels your financial goals.

OUR TECHNOLOGY

With just a few clicks, enjoy access to a **comprehensive, secure platform**, by means of **MENSA Online Access** and a mobile application. Benefit from **instant access to your consolidated financial position** and **advanced portfolio reporting**. It's all engineered to **save you time** and it's how we address the issue of **transparency**, while exponentially enhancing our capabilities.

Our technology is capable of providing:

- **AUM Analysis**
- **Performance Analysis**
- **Risk Analysis**
- **Wealth Overview**

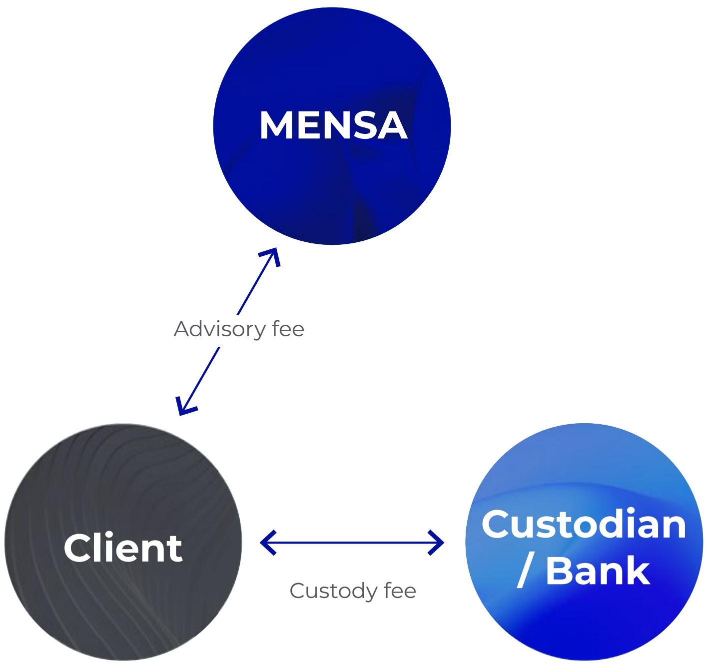
...and so much more

PRICING

Our pricing models are designed to provide competitive and transparent cost structures

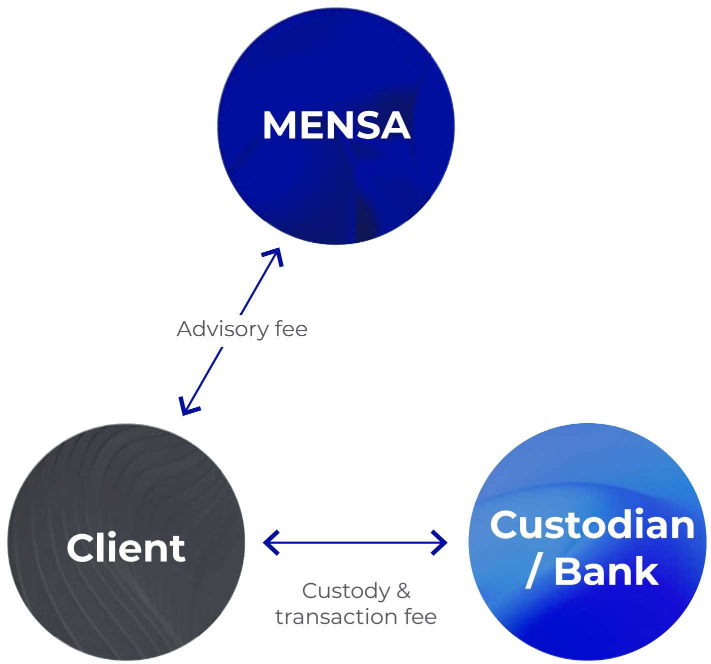
All-in fee model

Our all-inclusive fee model encompasses a range of predefined services, ensuring transparency and alignment with your investment amount, strategy, and asset allocation preferences



Transaction fee model

Our transaction and advisory fee model provides a cost-effective and transparent approach, with fees based on specific transactions, trades, and advisory services



OUR PARTNERS

WORKING WITH THE MENSA INVESTMENTS TEAM

Investing in **personnel with expertise and an entrepreneurial spirit** is the cornerstone of our approach at MENSA Investments. We are dedicated to cultivating truly transformative client relationships. Our firm attracts and nurtures talented, passionate professionals in an environment that empowers them to excel.

This unique culture didn't happen by chance. In our domain, we understand that **a client relationship is sacred**. Acting solely in a client's best interests is paramount. With us, independence and innovation thrive, preserving the sanctity of client relationships while granting our staff full ownership.

Every step of the way, our team is fortified by a comprehensive range of investment and wealth planning solutions, as well as a team of experienced professionals and partners to execute and manage them efficiently.

By choosing MENSA Investments, you're not just partnering with a financial institution; you're entering into a **collaborative relationship with a team deeply committed to your financial success**. Our dedication to client interests, coupled with a wealth of expertise and innovative solutions, ensures that your financial journey is in the best hands.

WHY SHOULD YOU JOIN US?

Joining MENSA is more than just a career choice; it's an opportunity to be part of a **dynamic, client-focused team** that values innovation, growth, and excellence. Your contributions will make a real difference, both to your professional development and to the financial success of our clients.

The core principles of **independence** and **neutrality** and an exclusive focus on **serving the best interests of clients** gave birth to MENSA Investments. We extend a warm welcome to relationship managers who possess both exceptional abilities and unwavering integrity, fostering a collaborative environment enriched by a flat hierarchical structure. As a privately owned, independent enterprise, we function as a **collective of entrepreneurs**, not merely as employees. Our primary objective is always to work together, offering guidance and solutions, while preserving each other's client relationships. Ultimately, **when you prosper, so do we.**

If you're an experienced and passionate professional, eager for fresh challenges, **we invite you to explore new horizons with us**. At MENSA Investments, you'll have the opportunity to assume full ownership of your client relationships and partake in their achievements. **Reach out to us today** and embark on a rewarding journey that aligns your success with your clients.

OUR FOUNDER AND CEO

An entrepreneur at heart, from the start

At the helm of MENSA Investments stands **Srinivas Goud Rachakonda**, fondly known as **Srini**, the visionary who conceived the firm with a resolute commitment to establishing a world-class Independent Asset and Wealth Management company prioritising clients' needs.

With an **illustrious 22-year career** in financial advisory and cultivating relationships with high-net-worth individuals, Srini's leadership has shaped MENSA Investments. His belief in a more **client-centric approach** led him to chart uncharted territories, where relationships are anchored in independence and transparency.

Boasting over 18 years of residency in the UAE, Srini possesses a profound understanding of the financial and cultural nuances of the Middle East. Having held the position of Director at UBS AG, in addition to **key leadership roles** at global private banks such as ICICI Bank, Citibank, N.A., Standard Chartered Bank and Mashreq Private Bank, Srini brings **unparalleled expertise** to the firm.

Throughout his private banking journey, Srini has earned **numerous awards,** a testament to his exceptional skills. His approachable demeanour and inspirational leadership make him relatable to clients and a **driving force for his team**.

Backed by a Master's in Science in Information & Technology, Srini combines **extensive financial acumen** with **advanced entrepreneurial skills**, showcasing the depth and breadth of his knowledge and capabilities.

OUR TEAM


SREEVATSAN GIRIDHARAN
CO-FOUNDER &
CHIEF OPERATING OFFICER


WESAM AL FARRAJ
HEAD –
INVESTMENT ADVISORY


IBRAHIM HASSAN
EXECUTIVE DIRECTOR


MOHAMMED SALHIEH
EXECUTIVE DIRECTOR


PRASHANT SAINI
MANAGING DIRECTOR


NELSON MATHIAS
DIRECTOR –
PRIVATE BANKING


DHIRAJ SAWHNEY
DIRECTOR –
PRIVATE BANKING


ABISHEK YADAV
DIRECTOR –
BUSINESS DEVELOPMENT


ALEEMUDDIN ALI KHAN
DIRECTOR –
OPERATION & SERVICE

OUR TEAM


PALAK KATYAL
COMPANY SECRETARY & FINANCE EXECUTIVE


NICOLE ALEMAO, CFA
INVESTMENT & PRODUCT SPECIALIST


SARANYA RAJENDRAN
OPERATIONS OFFICER


YULIIA KHAILO
CUSTOMER SERVICE OFFICER


AMARENDER INDURI
ADMINISTRATION MANAGER


CHARAN MUKKERA
ASSISTANT ADMINISTRATION OFFICER

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