AZ Capital

Investment Advisory Services

Equity Portfolio Service

Prospectus

Someone’s sitting in the shade today because someone planted a tree a long time ago

~ Warren Buffet

Who is an investment advisor?

Hiring a good investment advisor is the best decision you will make because, he will not only make you money, but save your time, energy and years of frustration, that you would otherwise go through, without a sense of direction.

A good Investment Advisor:

- does not push thousands of products
- does not change his approach to beat the market
- is ready to admit his mistakes when they are wrong
- is not emotionally attached to any investment
- is free from "i told you so" syndrome

An advisor's most important job is to empower you to make sound decisions, by imparting the right knowledge.
If you don't feel empowered, then it's not a good match

Why AZ Capital

Strong Bond

Helping people to Achieve their dreams & Aspirations & becoming financially independent

Best in Class Research

Best research minds with sharp analytical acumen to help you make optimal decisions

Corporate Governance

SEBI registered Investment Advisor with highest standards of corporate governance

Open architecture

Providing with High quality stocks portfolio that fetch you with good returns

Relationship first

On ground support to solve your queries instantly

Technology

Advanced technology enabled to monitor your portfolio 24x7

Section 1

Our Philosophy

Our philosophy is to always treat our clients' money as our own savings. We focus on avoiding permanent loss of capital and always remember that it's not client's wealth but their "hard earned savings". We are custodians of their capital.

Dear Investor,

We started off with an aim... An aim to ensure that you do not fall prey to incorrect, miss selling & motivated news, hype, promotional activity or random hunches.

You may not have time to do an in-depth analysis of your investment... We value your time.

You may not have the complete knowledge of which share's gonna rise or fall, which MF is best for your life goal... We use our expertise to create & monitor

Personalized Portfolios for you.

Section 1

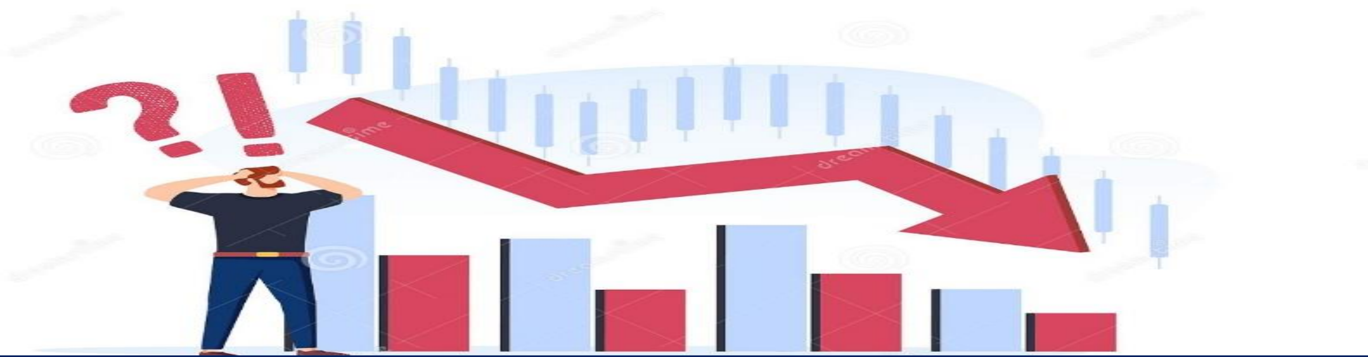
Our Philosophy

A wrong decision can hurt you financially... We value your hard-earned money.

We are on a mission to provide you with a scientifically researched, unbiased recommendations for your growth & value your trust.

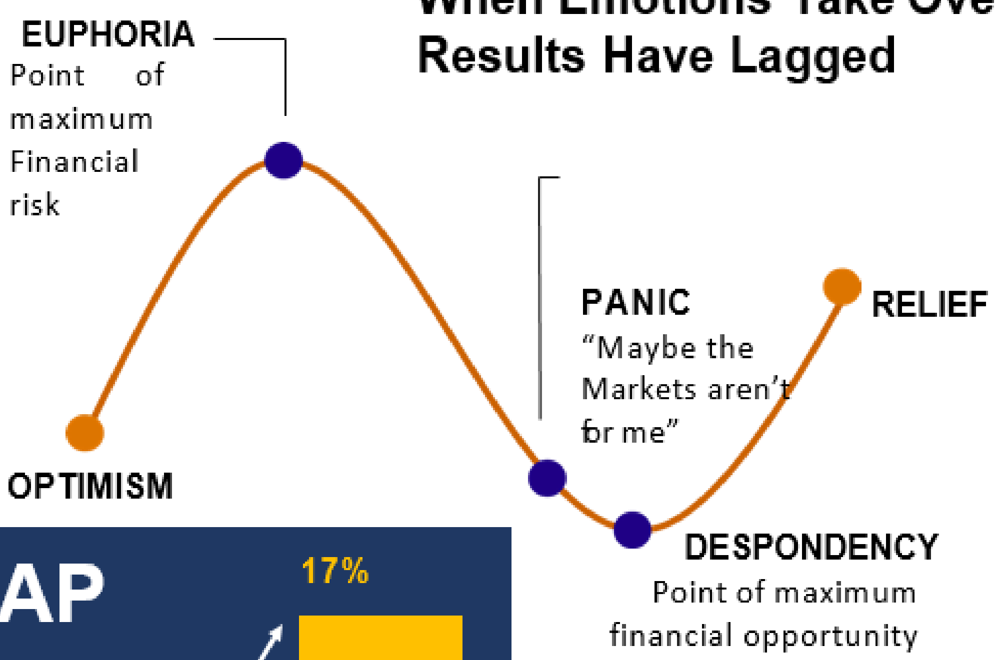
Are you facing any issue related to stocks/mutual funds??? Just Look Here... We stand by you 24x7, with our expert's team, rich experience, detailed analysis & build customize portfolios as per your needs & risk appetite.

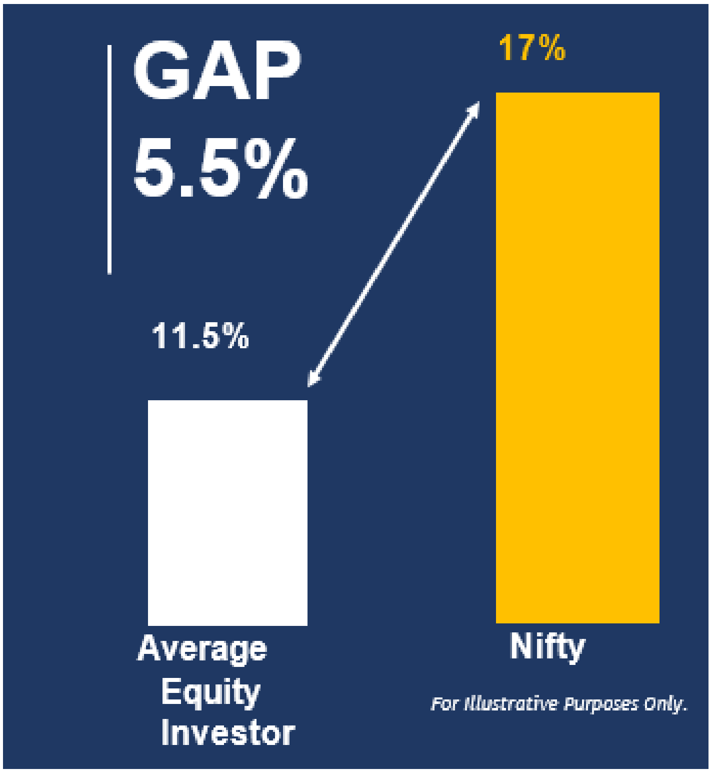
WE CARE FOR YOU & YOUR INVESTMENT



Where Investors Fail?

When Emotions Take Over… Results Have Lagged





"Success in Investing comes more from avoiding mistakes of permanent loss of capital."

Anees Ahmed, CIO

Our Approach

We offer personalized investment portfolio management. Our endeavours to create best portfolios. By best portfolios, we mean the one with a return that meets investor's objectives adjusted for risk

UNDERSTAND

Our 360°approach starts with YOU at the centre. We start by analysing your risk appetite. That is how much risk you can afford.

DESIGN

Then, we make a comprehensive equity portfolio optimising all the aspects of investment opportunities with unbiased investment advices – customised and keeping in view your risk profile, investment objective and preference

REVIEW

Monitoring and reviewing regularly to ensure you are on track to achieve your expected returns including evaluating portfolio performance, benchmarking and portfolio analytics.

Salient Features

What does the service cover?	• Optimal portfolio size to generate high risk adjusted returns. • Resilient portfolio which helps Low drawdown & fast recovery stocks to make portfolio robust. • Timely churn of stocks that don't make the cut are clinically removed without emotions. • Dynamic rebalancing of stocks to keep portfolio growth steady. • Well balanced and diversified for long term wealth creation.
Process	• Fee has to be paid upfront • Client will have to fill up the Client Profiler (Online or Hardcopy) • You will receive soft copy of the initial report / review report via email (advisory@azcapital.co.in) • Service will be due for renewal after 1 year and can be continued by paying renewal fees as applicable on date
Stocks will broadly fall into any of the 3 categories	• Quality at a reasonable price: a screener that includes parameters on return ratios, debt position, and valuation. • Earnings momentum stocks: stocks whose quarterly revenue and earnings growth exceeds pre-defined criteria. • Significant Megatrends: stocks whose industries fall into a "sweet spot".

Section 3

The Firm

Our Vision is:

To be India's most trusted and client-centric investment advisory services provider, helping people achieve financial independence & financial well-being, grow & preserve wealth.

We are committed to earning our client's trust by building lasting relationships and confidence, putting the client's interest first in everything we do.

Mr. Anees Ahmed leads the Investment Advisory at AZ Capital.

Clients find confidence in knowing that he uses a carefully structured process for choosing investments and aiming to minimize risk.

We truly listen to our clients in order to understand your story and what you are going through.

It's our goal to help the people to protect your assets and make the most of your wealth.

Why Clients Choose Us?

AZ Capital is an independent, SEBI registered investment advisory firm serving the financial planning and investment management needs of a select group of established individuals and families, as well as business owners. We are a new generation of financial advisors with a mission that is defined by 4 core principles:

INDEPENDENCE

Clients build the confidence and trust that comes from collaborating with an experienced team that puts their interests first

COMMITMENT

Clients receive clear and concise guidance as well as portfolios tailored to their individual circumstances

FOCUS

Clients feel they've been empowered to make better and more informed decisions for their financial future

RELATIONSHIP

Clients build a long-term relationship with us because of our Integrity and the devotion we have to help them achieve financial success.

A LIFETIME PARTNERSHIP

A successful journey through life requires hard work, sound decision-making and financial strength. In the years ahead, you'll uncover new opportunities and face fresh challenges – and we'll be here to help manage your investments throughout your lifetime.

To start working on your investments, contact Anees Ahmed to guide you through the steps outlined in this prospectus.

YOUR TRUSTED INVESTMENT ADVISOR

AZ Capital

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