AZ Capital

Investment Advisory Services

Platinum Advisory 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

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

On ground support to solve your queries instantly

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 going to rise or fall, which MF is best for your life goal... We use our expertise to create & monitor

Personalized Portfolios for you.

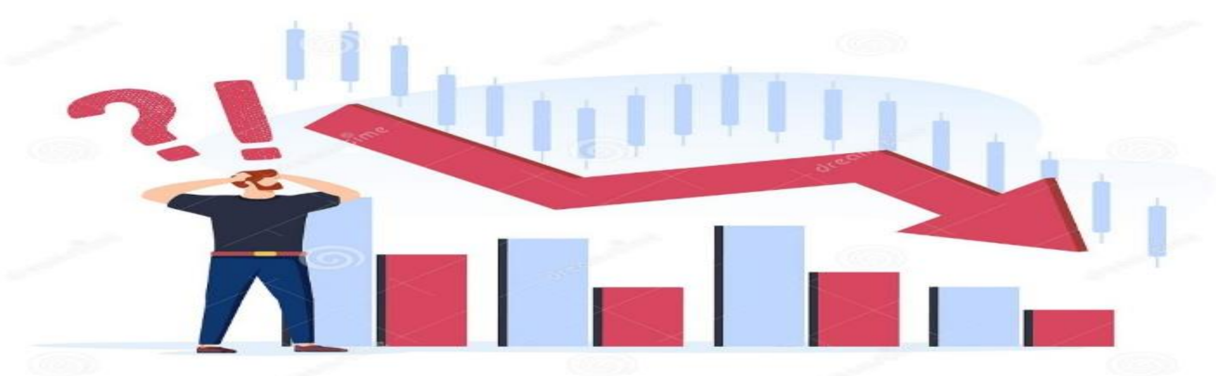
Section-1 Our Philosophy

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.

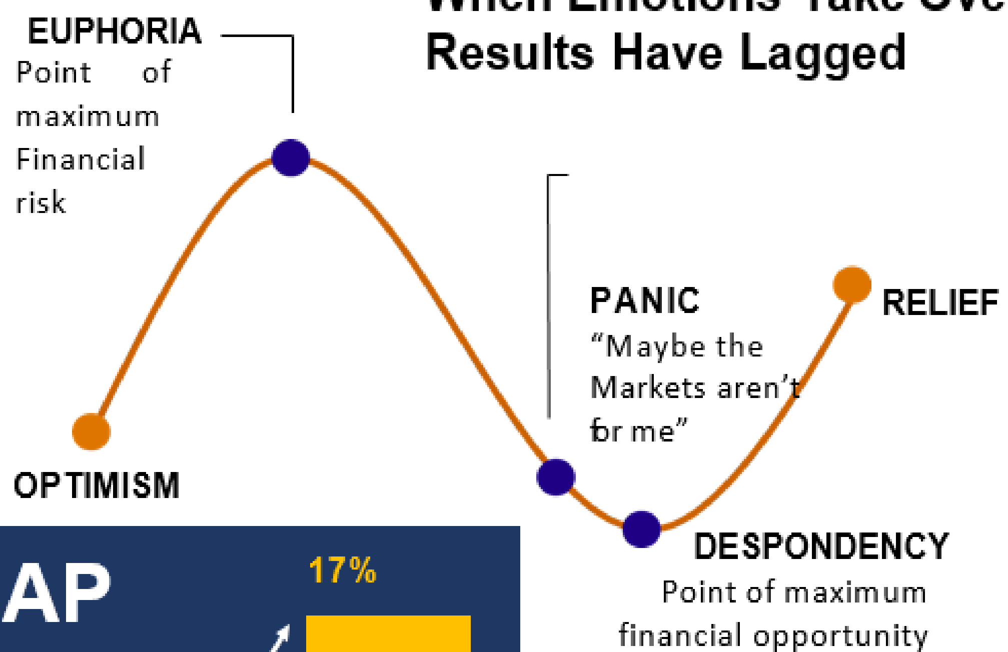
Are you facing any issue related to stocks/mutual funds??? Just Look Here... We stand by you 24x7, with our expert's team, rich experience, detailed analysis & build customize portfolios as per your needs & risk appetite.

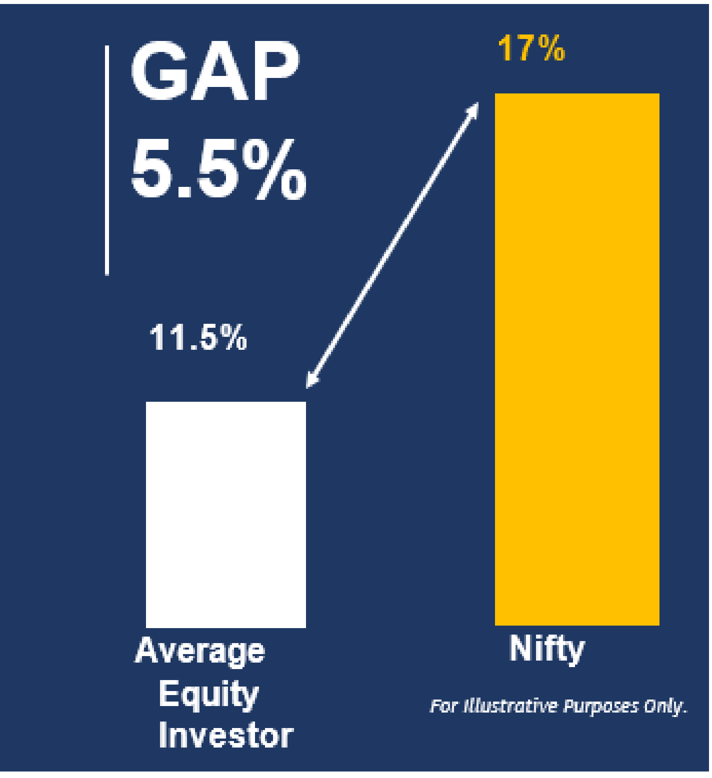
WE CARE FOR YOU & YOUR INVESTMENT



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

How we work?

Risk Profiling

Asset Allocation

Investment Solutions

Portfolio Review

Section-2

Our Approach

We follow a 3-step process. Create an investment research report (IRR) based on your financial objectives and risk profile. Once you agree on the IRR, we help you execute followed by close monitoring

Step 1: Investment Research Report

Step 2: Portfolio Implementation

Step 3: Portfolio Monitoring

Step-1 Investment Research Report

Investment Research Report (IRR) is a document that has common language for the advisor and the investor.

We create this document considering financial information provided by the investor and also the risk assessment.

After numerous rounds of discussion with the investor, we finalize the asset allocation. The asset allocation entails the following asset categories:

- Exchange Traded Funds (ETFs)
- Mutual Funds
- Direct Equity
- Bonds

Exchange Traded Funds (ETFs)

We prefer ETFs over mutual funds in the large cap equities and foreign equities.

Mutual Funds

There are selected equity and debt mutual funds that we prefer investing.

Direct Equity

We invest in high quality companies for long-term.

Bonds

We invest in bonds directly or through mutual funds. Preservation of capital is the first objective.

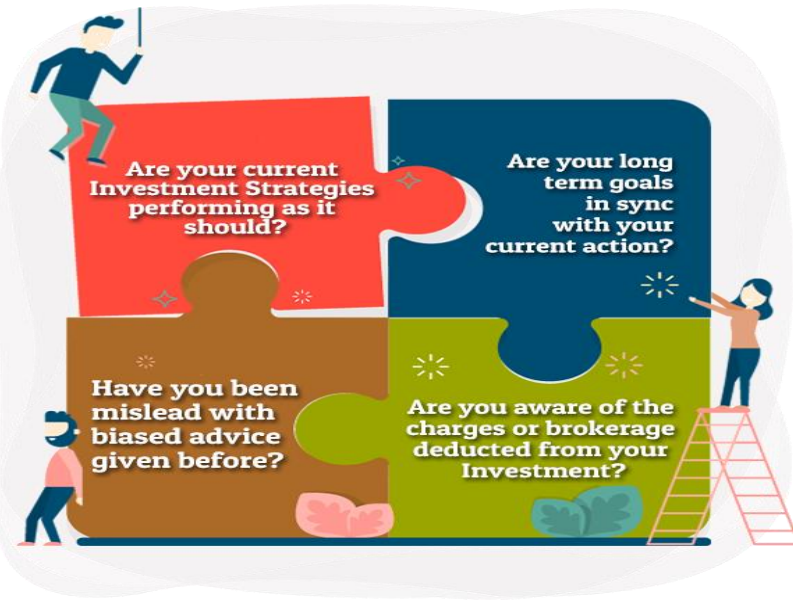
Step-2 Portfolio Implementation

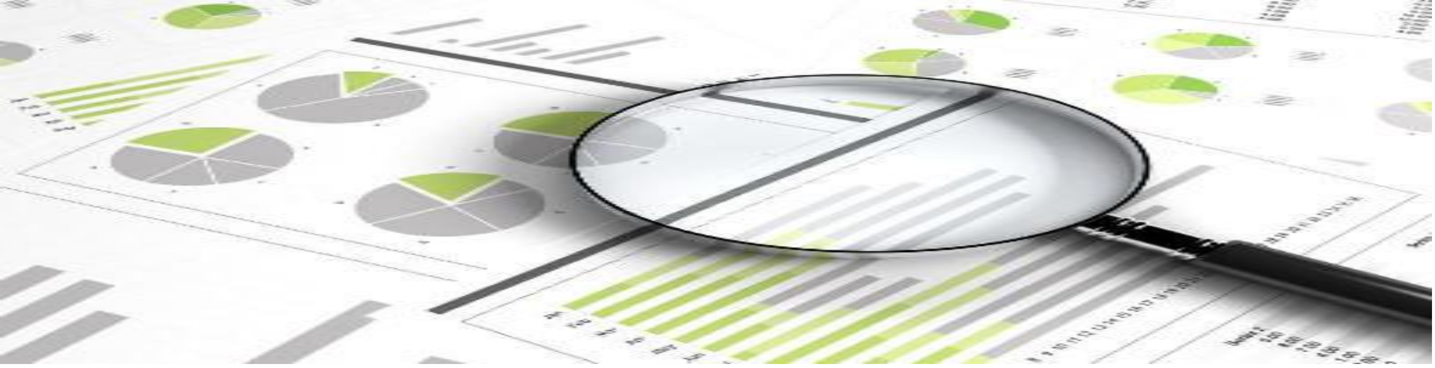
Portfolio implementation is a key to the realization of returns. As an advisor, we help you do the implementation of the plan.

Safety of your investments is critical to our approach. Our investment advisory service is completely unbiased and not indulged with any distribution of demat and trading accounts like other broking firms, this naturally achieves the safety parameter.

All investments are executed at investor's end with his own demat and trading account. We do not make commissions or brokerage from any of our recommendation. Only you pay us.

If you do not like us, you can always remove us and withdraw your money or replace us with a new advisor.





Step-3 Portfolio Monitoring

Our investment portfolio monitoring services help keep us accountable for investment decisions. We conduct quarterly meeting to review investment progress. This ensures we are on track to meet our investment objectives.

Keeping track of your investment portfolio can be demanding. In particular, factors such as contributions, redemptions and rebalancing can make determining your investment performance cumbersome.

We provide 24X7 online access to your investment portfolio.

About us

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 our firm 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 clients to protect their assets and make the most of their 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 INVESMENT ADVISOR

AZ Capital

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