

**Prudent**

— Money through wisdom —

**FUNDZ BAZAR**  
Invest Anytime, Anywhere

**Prudent**



*Your Path to Prosperity in*

**FINANCIAL BUSINESS**

An Integrated Financial Product Distribution Group

Mutual Fund | Stock Broking | Insurance | PMS/AIF  
NPS | Corporate FD | Bonds | Property | Loans | Loans Against MF

# Let your money grow with India's Leading Investment Platform



## Prudent By Numbers



20,44,841

Happy  
Clients



36,44,644

LIVE  
SIPs



1,29,965 Cr

Asset Under  
Management



35,000+

AMFI Registered  
Channel Partners

4<sup>th</sup> Largest in Retail Wealth

5<sup>th</sup> Net Sales in Retail



138

Branches



36

States & UT

# ABOUT US

Prudent Corporate Advisory Services Limited was incorporated in year 2003 at Ahmedabad-Gujarat, is one of the leading Independent Retail Financial Distribution Group.

Over the years, we have evolved into a leading and respected distributor of a wide range of financial products including Mutual funds, Insurance, Stock Broking, PMS, AIF, Corporate FD, Bonds, Loans Against MF, NPS, Unlisted Securities and Smallcase.

The company leverages technology and comprehensive investment solutions to meet the evolving financial needs of its clients while expanding its presence across both online and offline channels.

Prudent Corporate's success can be attributed to its unique business-to-business -to-consumer (B2B2C) model, complemented by technology- driven investment and financial services platform. This comprehensive approach enables the Company to offer end-to-end solutions crucial for distributing financial products.

## FINANCIAL PRODUCTS

Prudent corporate Advisory Services Ltd. is the flagship company and a primary arm of the Prudent Group. It offers specialized services in the area of Personal and Corporate Financial Services through distribution of Mutual Funds and other Financial Products.



## STOCK BROKING

The company is a member of Bombay Stock Exchange (BSE), National Stock Exchange (NSE) and Central Depository Services(I) Ltd (CDSL).

## INSURANCE

Gennext Insurance Brokers Pvt. Ltd. is an IRDA registered Insurance Broker. The company provides both Life and General Insurance solutions through offline as well as online portal.



## PROPERTY

Prudent Properties is a RERA (Real Estate Regulatory Authority) registered Real Estate Agent in the states of Maharashtra, Gujarat & Karnataka which provides Real Estate solutions in Mumbai, Pune, Ahmedabad, Bengaluru & Mysuru.

# PRUDENT GROUP

**Prudent** Corporate Advisory  
Services Limited  
— Money through wisdom —  
[www.prudentcorporate.com](http://www.prudentcorporate.com)

  
**Prudent Properties**  
Commercial. Residential. Rent. Pre-lease. Plot. Land  
[www.prudentproperties.com](http://www.prudentproperties.com)

**gennext** Insurance Brokers  
Pvt. Ltd  
[www.gennextinsurance.com](http://www.gennextinsurance.com)

## SERVICE PLATFORMS

  
**FUNDZ BAZAR**  
@invest Anytime, Anywhere  
[www.fundzbar.com](http://www.fundzbar.com)

**PrudentConnect**  
Partnership for Growth  
[www.prudentcorporate.com](http://www.prudentcorporate.com)

  
**FUNDZ BAZAR**  
@Trade Anytime, Anywhere **BROKING**  
[www.fundzbar.com](http://www.fundzbar.com)

  
MAKING HER ATMANIRBHAR  
[www.laxme.com](http://www.laxme.com)

  
**CreditBasket**  
Loan Lena Ab Aasaan!  
[www.creditbasket.com](http://www.creditbasket.com)



**Mr. Sanjay Shah**  
Managing  
Director



**Mr. Shirish Patel**  
Chief Executive  
Officer



**Mr. Chirag Shah**  
Whole-Time  
Director



**Mr. Chirag Kothari**  
Chief Financial  
Officer

# OUR PRODUCTS

Benefits you can offer to your clients through FundzBazar web & mobile platform

## INSURANCE

Term, Health, Motor, Personal Accident, Critical Illness, Endowment, ULIP etc

## EQUITY BROKING

Invest in stocks of your choice aided by research, trading ideas & market reports.

## PMS / AIF

Professionally managed portfolios as per risk appetite & returns expectation.

## MUTUAL FUND

To invest into Equity, Debt or Hybrid schemes in lump sum or systematically



## SMALLCASE

Basket of stocks designed to build diversified, low cost & long term portfolio

## LOANS

Home Loan, Loan Against Property, Personal Loan, Credit Card, Business Loan etc.

## LOAN AGAINST MF

Get instant Loan Against your investments

## FD & BONDS

Multiple options of sec. bonds & well rated Corporate FD of different tenures

# GROWTH TRAJECTORY FOR OUR PARTNERS

## READYMADE SOLUTIONS

- ▶ Client Acquisition Tools
- ▶ Productivity Tools
- ▶ CRM
- ▶ Portfolio Builders

## SELF BRANDING

- ▶ Your own website & Mobile App
- ▶ Personalised Images & Videos

## RESEARCH & REPORTS

- ▶ White-labelled Reports
- ▶ Research Reports
- ▶ Business MIS

## STRONG TECHNOLOGY

- ▶ 360° Prudent Partner Desk
- ▶ Multi - Featured FundzBazar Platform

## REGULAR TRAINING

- ▶ Product & Process Training
- ▶ Certification Training

## CLIENT SERVICING

- ▶ Dedicated RM
- ▶ Customer Care Support



# FUNDZBAZAR OFFERING

Single Investment Account with Mutual Funds, Stock Broking, Fixed Deposits, NPS, Bonds, Smallcase and Loan Against MF All under one roof.



## PRODUCT OFFERING

Mutual Funds,  
Insurance  
Stock Broking,  
Fixed Deposits, NPS,  
Bonds, Smallcases,  
Loan Against MF



## ACCOUNT OPTIONS

Single login account  
for Individual, Minor,  
HUF & NRI with  
multiple holding  
combinations  
covering Family.  
Proprietor, Corporate



## PLANNING

Risk profiling,  
Financial Calculator,  
Goal Planning,  
Asset Allocation,  
Smart Combos,  
Shubh Shuruat



## TRANSACTION

Purchase, Step-up SIP,  
STP, SWP,  
Switch, InstaFundz,  
Redemptions,  
Trigger Facility



## REPORTS

Portfolio Valuation,  
Capital Gain/Loss,  
Dividend Income,  
SIP/STP,  
Portfolio Scanner



## SCHEME RESEARCH

Fundz Analyzer,  
Peer Comparison  
SIP Return Comparison,  
Rolling Return  
Comparison, Debt  
Fundz Analyzer



## INDUSTRY RESEARCH

Trends in FII/MFs,  
AUM Analysis,  
Cash Analysis,  
What's In/What's Out,  
Sector Allocation  
Analysis



# PARTNERSHIP THAT DRIVE YOUR BUSINESS & GROWTH

## BECOME A PRUDENT PARTNER

..... and scale up your business to next level .....



[www.fundzbazar.com](http://www.fundzbazar.com)



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