Armstrong
Strong Values...

OUR COMPANY PROFILE

Armstrong Capital & Financial Services Pvt. Ltd.

Expanding Horizons in Indian Wealth Management

About Us

Our diverse and dedicated team works together to ensure seamless client service. Each department specializes in a critical aspect of wealth management:

01 **Research Team**
Conducts in-depth analysis to identify the best investment opportunities.

02 **Financial Planning Team**
Develops detailed plans for financial independence and long-term goals.

03 **Client Relationship Team**
Acts as the bridge between research & financial planning team and clients.

04 **Operations Team**
Ensures smooth execution and management of client portfolios.

By combining expertise across departments, we provide holistic, client-centric solutions.

At Armstrong, we are redefining wealth management in India. With a client-first approach, we aim to expand financial horizons and empower individuals with personalized investment solutions.

About Our Team

Our Promoter

Ms. Manju Mastakar, an accomplished finance maven with extensive industry knowlegde of 25 Years, believes that wealth managers don't deliver returns, they create discipline and manage risk, which is what creates wealth.

Founding Team

Ratheesh Nambiar

Director

With over 20 years of distinguished experience in the financial services industry, Mr. Nambiar is a seasoned professional renowned for his deep understanding of market dynamics and investment strategies.

Rahul M V

Vice-President

With over 8 years of experience in the banking and wealth management industry, Rahul MV has built a strong foundation in delivering strategic financial solutions.

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Our Financial Success

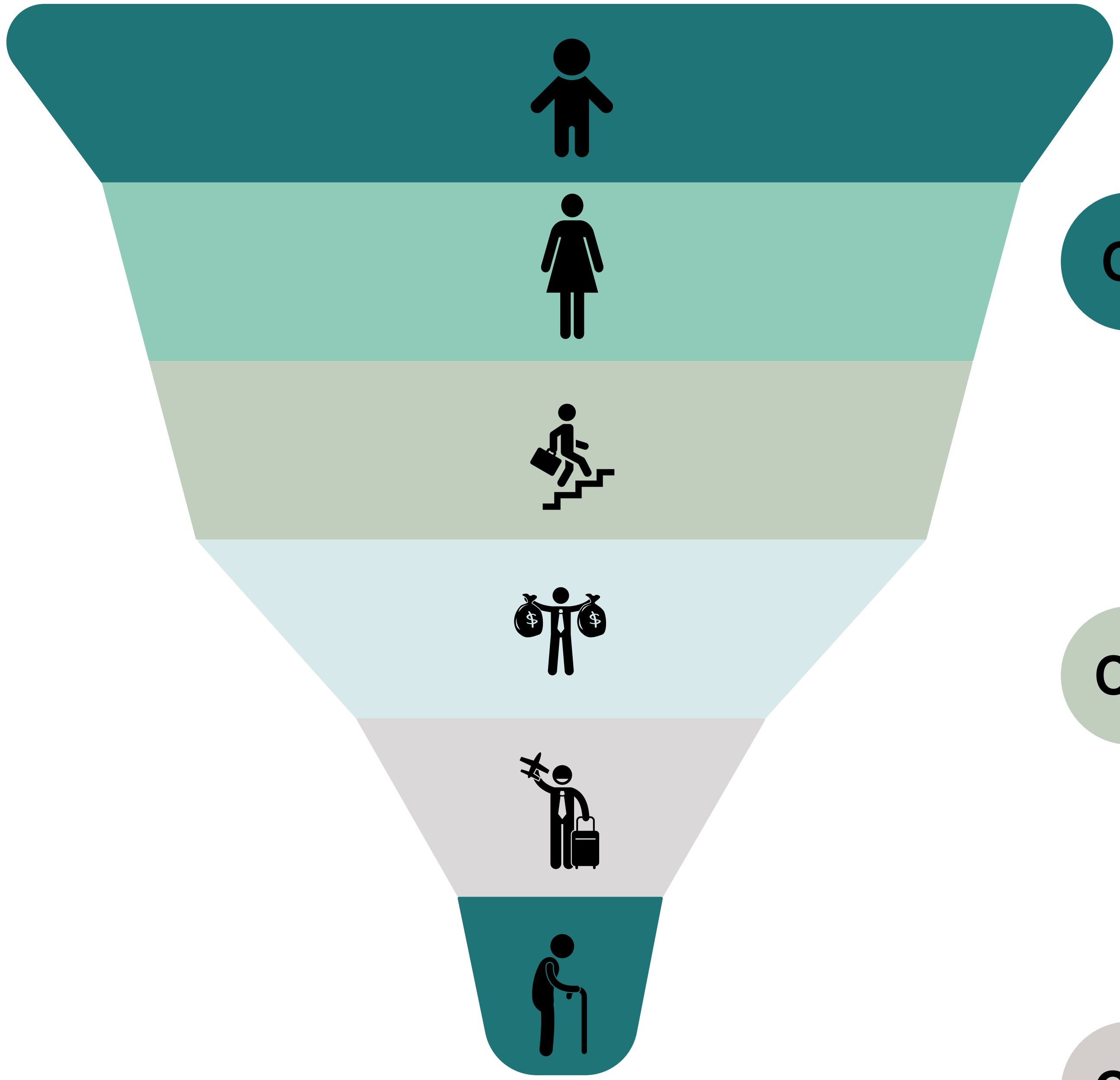
500+
Crores Of Assets Managed

1000+
Satisfied Clients

2000+
Strategies Planned

14+
Years Of Experience

Who We Cater To



01 Beginners

Those beginning their investment journey.

02 Women

Female investors seeking tailored financial solutions.

03 Transitions

Individuals undergoing career changes or life transitions.

04 Affluents

High-Net-Worth and Ultra-High-Net-Worth individuals.

05 NRIs

Non-Resident Indians looking to invest in their home country.

06 Retirees

Those planning for or navigating pre/post-retirement financial needs.

Our Offerings

We provide a wide range of investment options to cater to various financial goals and risk preferences.

Regular Offerings

Mutual Funds

Expertly selected funds for wealth creation and diversification.

Corporate FDs

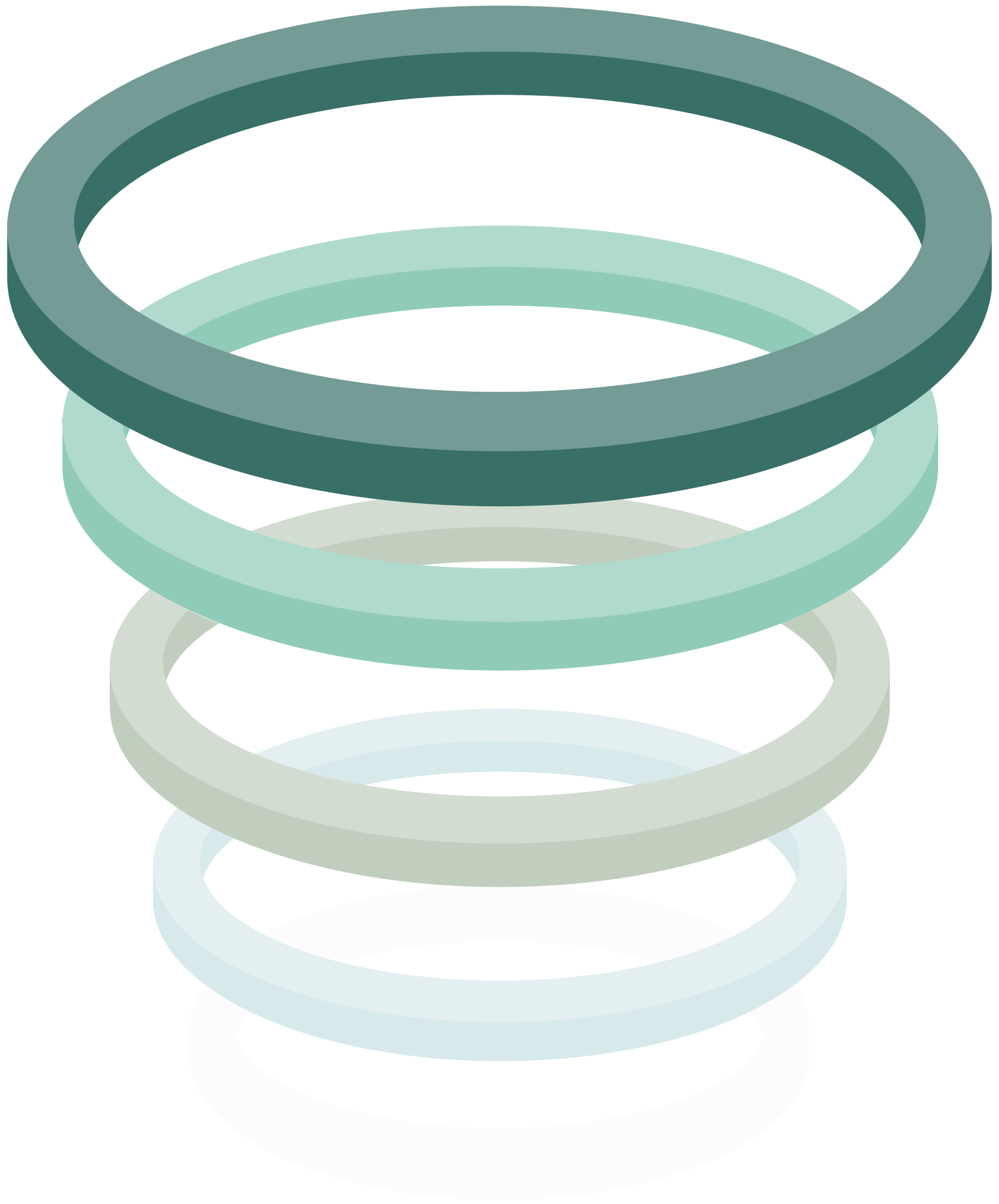
Secure, high-yield investment options for stability and steady returns.

Unlisted Shares

Access to high-growth potential opportunities in pre-IPO and unlisted companies.

Insurance

Comprehensive solutions for life, health, and general insurance needs.



Unique Offerings

Curated Portfolio

We offer direct Equity investment handholding and guidance at fixed subscription fees.

Fractional Real Estate

Our investors can avail the benefit of annuity through our fractional real estate investment option.

International Investing

Through US Stocks and ETFs, investors gain access to the global market for geographical diversification.

PMS

Through GIFT City PMS, our NRI and PIO investors can bypass the Indian Tax system.

Our Research

Our research is the backbone of informed decision-making

100+

Reports made on MF schemes

50+

Reports made on sectors

25+

Reports on International Funds & ETF's

50+

Smallcases analysed

Multiple

Calculators, universe comparison, non-performance evaluation

35+

Valuation models made

Visit our linkedIn page to explore our in-depth research

LinkedIn Page

Recommendation Methodology

Our research process goes beyond just analyzing past performance. We employ a comprehensive, multi-factor approach to identify high-quality investment opportunities.

Research

Our research method focuses on accuracy and planning to help make better decisions, predict market trends, and find suitable opportunities for clients.

White-list

In order to provide our clients with the most suitable investment options we have a list of top-performing funds based on a wide range of crucial parameters.

Model Portfolio

Our model portfolios provide uniform investment strategies for different financial situations, ensuring reliable advice and solutions that match clients' goals.

Some Research Parameters

- **Sharpe Ratio:** Measures risk-adjusted returns, indicating how well a fund compensates for the risk taken.
- **Beta:** Indicates a fund's sensitivity to market movements compared to its benchmark.
- **Capture Ratio:** Assesses how well a fund performs in up or down markets relative to its benchmark.
- **Recovery Ratio:** Evaluates how quickly a fund recovers from a drawdown or market decline.
- **Drawdown Ratio:** Reflects the extent of the fund's decline from its peak, highlighting downside risk.

Model Portfolio Performance

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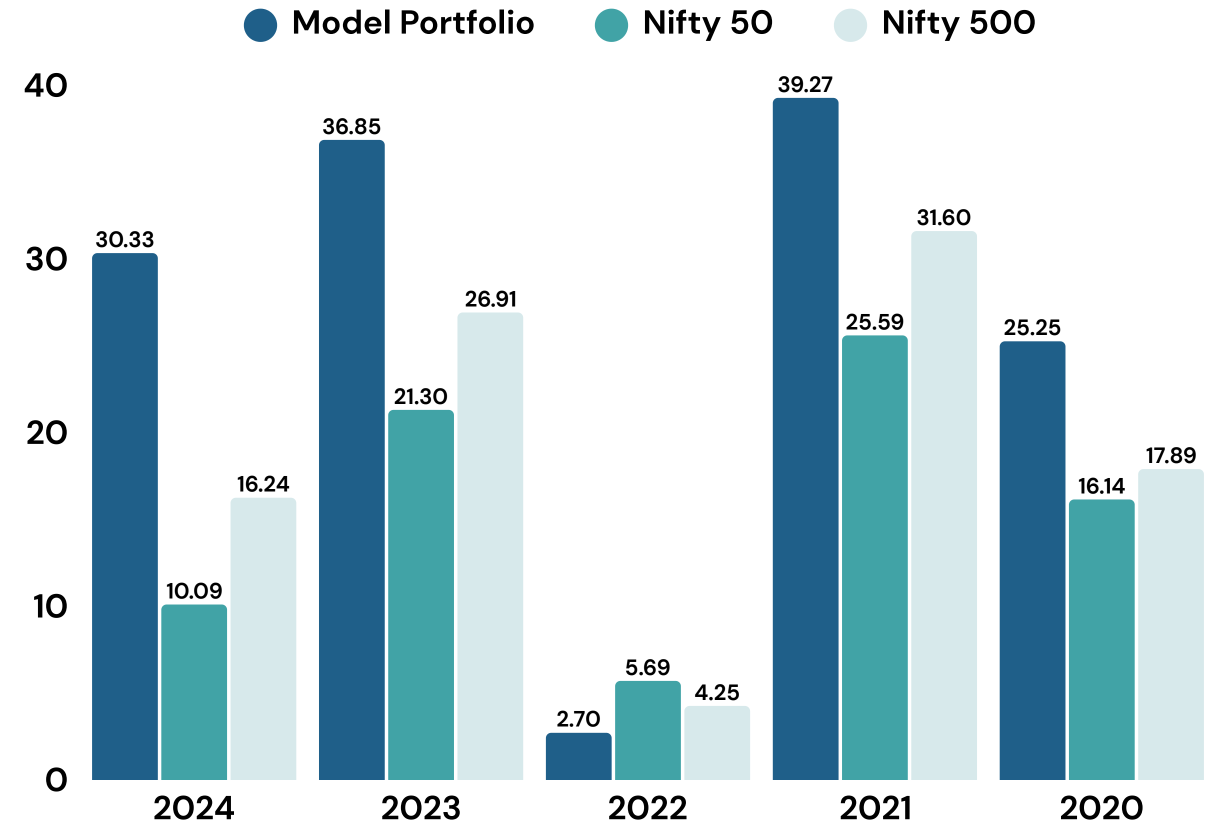
Returns Comparison



6.67

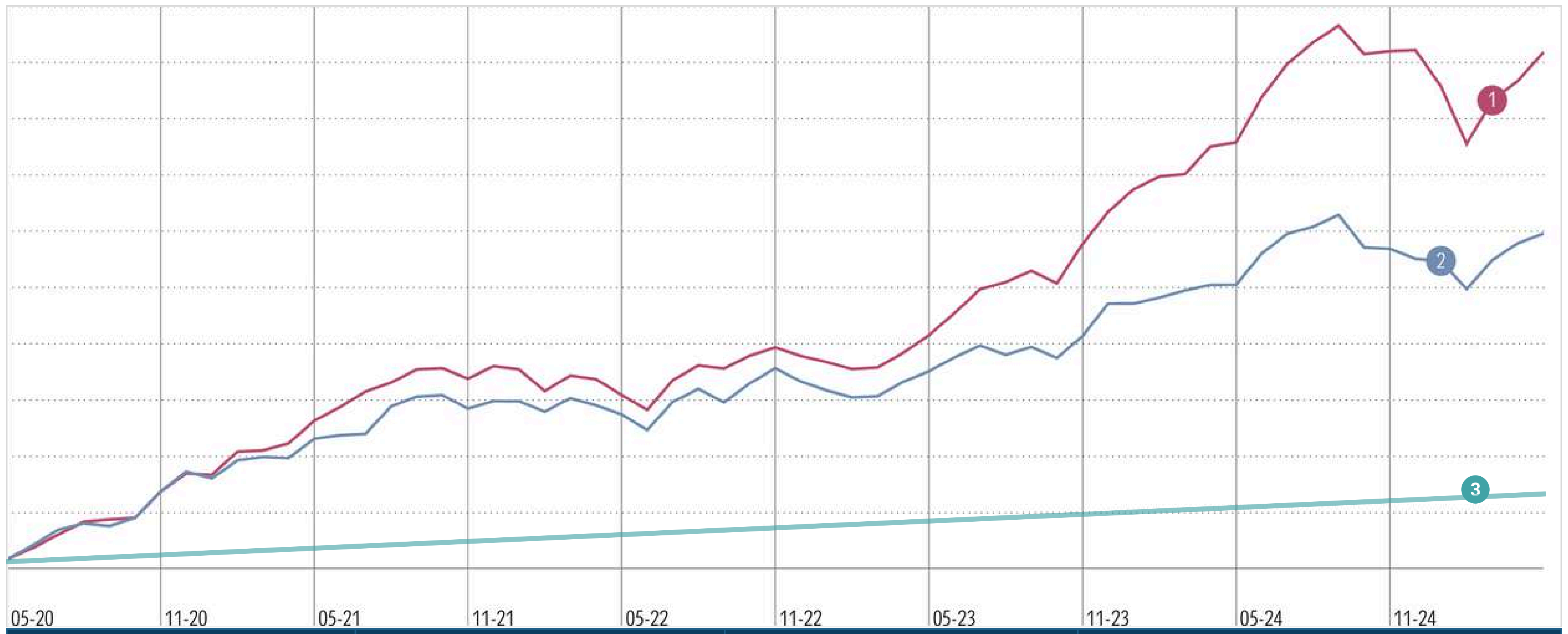
Model Portfolio Alpha

0.92

Model Portfolio Beta

5-Year Investment Growth Chart

Initial Investment: ₹ 1,00,000 | **31-05-2020 to 31-05-2025**



Investment	Cumulative Return	Annualized Return	Amount at end of period
Model Portfolio	270.49%	29.94%	₹ 3,70,494
NIFTY 50	173.80%	22.32%	₹ 2,73,800
FD	27.62%	5%	₹ 1,27,628

Our portfolio has been crafted to generate superior returns while maintaining a lower standard deviation and beta, ensuring a balanced approach to risk and reward.

Our Past Performance (2015-2025)

19% CAGR

Equity Aggressive Portfolio

Portfolio with 100% equity allocation.

15% CAGR

Balanced Portfolio

Portfolio with moderate risk, i.e., 80% equity and 20% hedged equity.

13% CAGR

Risk-averse Portfolio

Portfolio with minimal risk, i.e., 50% equity and 50% hedged equity.

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How We Can Help

We can help you navigate the complexities of wealth creation with the following measures.

01 **Planning** — Craft a personalized roadmap to reach your financial objectives.

02 **Profit Booking** — Capitalize on higher CAGR by timely profit booking.

03 **Anticipation** — Pre-empt performance shifts due to events like fund manager changes or monetary policy updates.

04 **Asset Allocation** — Adjust asset allocation dynamically based on market trends.

05 **Efficiency** — Save you time and reduces financial stress.

06 **Discipline** — Encourage consistent, disciplined financial habits.

Our Customer Journey

Getting To Know You

We start by gathering details about your current investments, financial goals, and timelines to understand your unique needs.

Crafting Your Plan

We create a personalized financial plan and discuss it with you in detail.

Choosing the Right Investments

We recommend suitable investment options tailored to your goals and preferences.

Organizing Your Investments

Over the next 4-6 months, we help consolidate all your past investments for a clear and streamlined portfolio.

First Portfolio Check-Up

After 9-12 months, we review your portfolio to ensure everything is on track, address any pending tasks, and provide updates.

Complete Portfolio Review

At 18-24 months, we conduct a detailed review of your portfolio's performance and make any necessary adjustments.

Long-Term Portfolio Strategy

Between 40-50 months, we evaluate your portfolio's performance and recommend reallocation or booking profits as needed.

Refreshing Your Financial Plan

After 50-60 months, we revisit your financial goals and create a follow-up plan to measure progress and stay on course.

How We Can Start

Our systematic process ensures seamless wealth creation.

STAGE 01 — Assessment

Examine investors' current financial situation, including debts.

STAGE 02 — Evaluation

Evaluate investors' needs and financial goals.

STAGE 03 — Understanding

Understand investors' risk tolerance and time horizon.

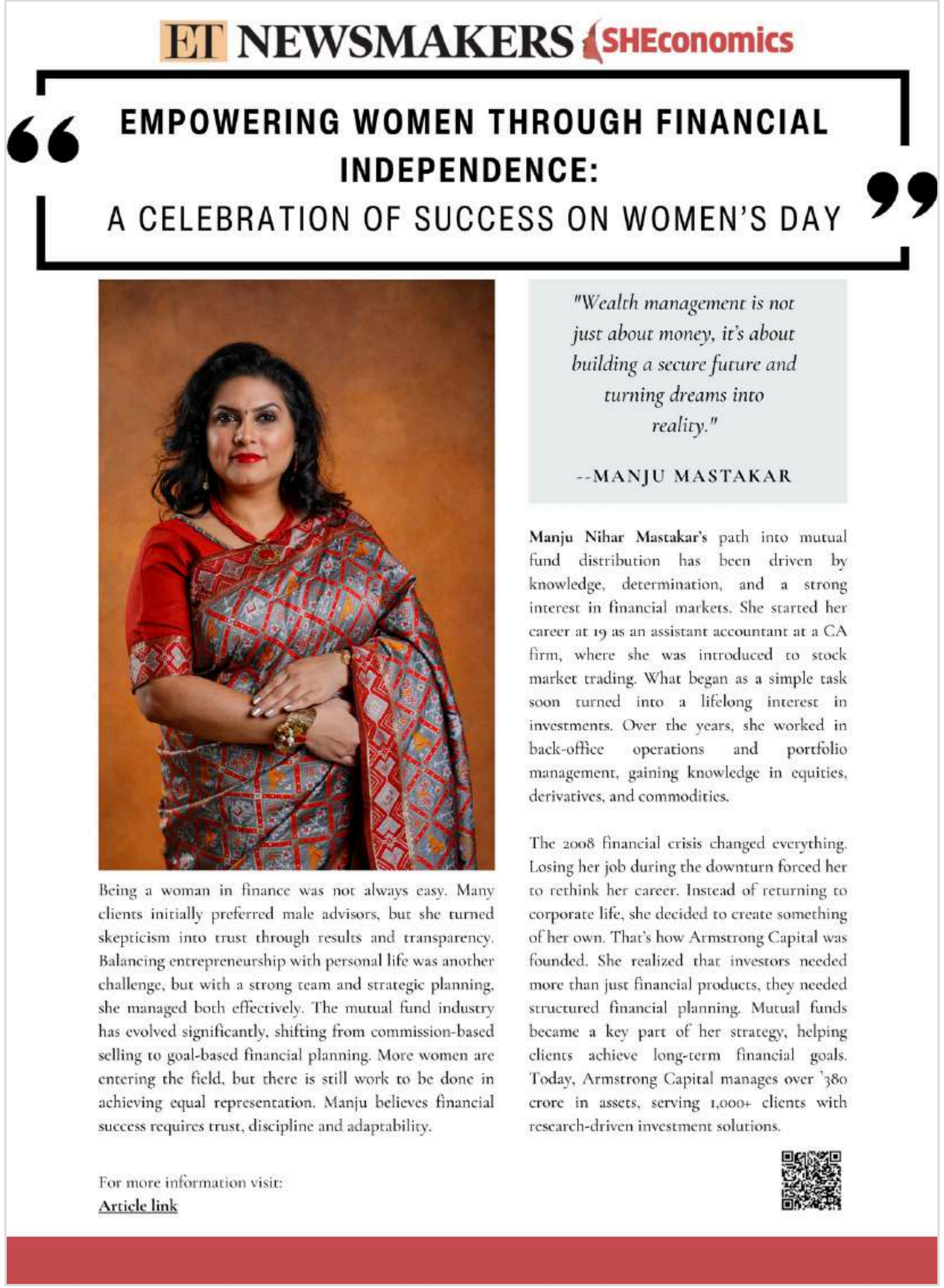
STAGE 04 — Identification

Identify potential investments and build a sound portfolio.

STAGE 05 — Monitoring

Monitor risk levels to create a long-term winning portfolio.

Our Awards & Achievements



ET NEWSMAKERS SHEconomics

EMPOWERING WOMEN THROUGH FINANCIAL INDEPENDENCE:

A CELEBRATION OF SUCCESS ON WOMEN'S DAY

"Wealth management is not just about money, it's about building a secure future and turning dreams into reality."

--MANJU MASTAKAR

Manju Nihar Mastakar's path into mutual fund distribution has been driven by knowledge, determination, and a strong interest in financial markets. She started her career at 19 as an assistant accountant at a CA firm, where she was introduced to stock market trading. What began as a simple task soon turned into a lifelong interest in investments. Over the years, she worked in back-office operations and portfolio management, gaining knowledge in equities, derivatives, and commodities.

The 2008 financial crisis changed everything. Losing her job during the downturn forced her to rethink her career. Instead of returning to corporate life, she decided to create something of her own. That's how Armstrong Capital was founded. She realized that investors needed more than just financial products, they needed structured financial planning. Mutual funds became a key part of her strategy, helping clients achieve long-term financial goals. Today, Armstrong Capital manages over ₹380 crore in assets, serving 1,000+ clients with research-driven investment solutions.

Being a woman in finance was not always easy. Many clients initially preferred male advisors, but she turned skepticism into trust through results and transparency. Balancing entrepreneurship with personal life was another challenge, but with a strong team and strategic planning, she managed both effectively. The mutual fund industry has evolved significantly, shifting from commission-based selling to goal-based financial planning. More women are entering the field, but there is still work to be done in achieving equal representation. Manju believes financial success requires trust, discipline and adaptability.

For more information visit:
Article link

Aug 1, 2024

LET TRUTH PREVAIL

THE TIMES OF INDIA

TOP 3 VISIONARY INDIAN PERSONALITIES OF 2024

Manju Mastakar is the Founder and Managing Director of Armstrong Capital & Financial Services Pvt. Ltd., a leading investment solutions firm she established in 2010. Starting from a modest business center with no co-founders, she has grown Armstrong Capital into a top-tier wealth management company, impacting the lives of thousands of clients.

Ms. Mastakar's journey in finance began in 1997 at the age of 19 when she interned at a CA firm. By day, she crunched numbers, but by night, the allure of Dalal Street beckoned. Working as a dealer, she absorbed the wisdom of seasoned traders, transforming numbers into stories of potential growth. Amid the 2008 financial crisis, Ms. Mastakar relocated to Bangalore. Despite the global turmoil and the demands of motherhood, she became self-employed. Operating from her home office with minimal capital and relying on bootstrapping, she gradually built a substantial client base. Her resilience and determination transformed Armstrong Capital into one of Bangalore's top 10 wealth management firms.

Under her leadership, Armstrong Capital has embraced automation in wealth management, enabling the firm to scale up and offer innovative financial solutions. The company uniquely blends fintech advancements with a personal touch, as its enthusiastic financial advisors are dedicated to building lasting relationships and guiding clients toward a secure financial future.

Ms. Mastakar's journey is not just a success story but an inspiration. Her ability to navigate financial crises, pivot during the COVID-19 pandemic to become a Wealth Tech company, and her unwavering commitment to clients highlight her exceptional qualities. She continuously mentors her team, fosters innovation, and challenges conventional approaches, demonstrating that with determination and vision, it is possible to build something enduring and impactful.

For More Information Visit: **Article Link**

Our Media Presence:

Outstanding Financial Advisory Partner – by Insight Success (Click here).
The Best Performing Asset & Wealth Management Solution Providers in 2021 – by Business Fame Magazine (Click here)
Spotlight Edition 2022 – by Silicon India (Click here)

Thank You

Contact Us

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