



FIFA

FOUNDATION OF INDEPENDENT FINANCIAL ADVISORS



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We are proud to announce
new members of FIFA



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Jalpa M Buvaria

General | Ind | Rajkot | O2399



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Narendra Krishan Garg

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Bhagwatibhai Arvindlal Parikh

General | Ind | Vadodara | O2402



PRADEEP KANETKAR

Pradeep Madhukar Kanetkar

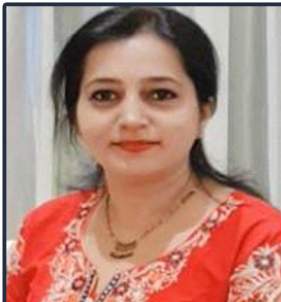
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Victoria Finserv

General | Ind | Kolkata | O2404



PREETI KALBURGI

Preeti R Kalburgi

General | Ind | Belgaum | O2405



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Yogesh S Ladhwa

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VAISHALI PATIL

Vaishali Vasant Patil

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RAVI JADAV

Ravi Bharatbhai Jadav

General | Ind | Rajkot | O2408



RAJESH KAMAT

Rajesh Ramesh Kamat

General | Ind | Goa | O2409



On 18th Aug 2022, Independent Financial Professionals Association (IFPA) Chennai had invited Ms. Roopa Venkatkrishnan to conduct knowledge sharing session.

Topic :
The Financial Landscape Post Pandemic

There were more than 150 IFAs who attended the session.



ideas that ignite

A national conference by **MasterStroke**
Empowering You

26th August 2022



Speaker : Dhruv Mehta
Chairman, Foundation of
Independent Financial Advisor

Topic

**THE ROLE OF AN INDUSTRY ASSOCIATION
FOR THE GROWTH OF MFDS**

10:30 am

+91 98838 18627 | info@masterstrokeonline.com

On 26th Aug 2022, Mr. Brijesh Dalmia, FIFA Director, had organised knowledge sharing session through zoom webinar. Mr Dhruv Mehta, Chairman of FIFA was the speaker at the session

Topic :
"The Role Of An Industry Association For
The Growth Of MFDs"

There were more than 375 IFAs who attended the session.

Please find an email from Life Member Mr N. Gowrishankar, Hyderabad

DISHA FINMART PRIVATE LIMITED
(Formerly DISHA EQUITIES AND ESTATES PRIVATE LTD)
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SEBI registration: NSF-AP1661001041 & BSE-AP0109020198454
CIN: U67200TG1095PTC021651

To
FIFA
MUMBAI

04th AUGUST 2022

Kind Attention: Mrs. Roopa Venkatakrishnan.

Sub: Non Receipt of Brokerages from AMC's

We were struggling to get the brokerages settled in respect of certain folios, from various AMC's.

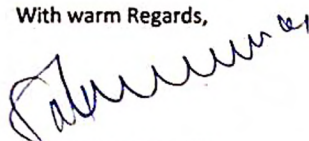
After corresponding with the RM's and even after escalating to their superiors too the matter was not getting resolved.

After reluctantly taking up with you and after you escalated the matter at the highest level, we now have assurances from all the AMC's that the Brokerages will be settled in the current settlement cycle, i.e. by the end of August.

We really appreciate your effort and sincerely thank for taking up the issue of a small MFD to the highest level. I could never image the magic of being part of this Association and would urge all MFD's to join this Association.

I once again, profusely thank FIFA and Mrs. Roopa Madam in particular.

With warm Regards,



N. Gowri Shankar CFP
For DISHA FINMART PRIVATE LIMITED
AMFI Registered MUTUAL FUND DISTRIBUTOR
HYDERABAD





Please find an email from General Member Mr. Himanshu Dani, Mumbai

Dear Roopa / Team FIFA

I am member of FIFA since last more than 10 years. Have seen lot of good work done by FIFA for MFD community.

I would bring to notice that recently, my ARN was getting renewed and I gave CPSE exam and the certificate was issued by NISM. When I wanted to renew my EUIN card as the ARN was in proprietrieship name I was in constant touch CAMs Chennai for last 2 months I didnt get any satisfactory reply from them.

Finally had put the message in FIFA whatsapp group with few hrs got call from Roopa and she connected me to senior person in CAMS Chennai & the issue was well understood & solved within 2 days.

I highly appreciate Roopa & FIFA team commitment to also solve the smallest issue of a small MFD like me.

Continue doing the astounding work for MFD community

--

Thanks & Regards,

Himanshu Dani

INVEST SEARCH,

508, G Square, 5th Floor, Jawahar Road,
Above Kalyan Jewellers, Near BMC Office,
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Mission Statement:

Assisting investors in FINANCIAL PLANNING, helping them in WEALTH CREATION thereby giving them COMPLETE FINANCIAL FREEDOM.



MF BULLETIN: THE INDUSTRY ADDS OVER 9 LAKH NEW FOLIOS

The folio count increases from 13.47 crore as on June 22 to 13.56 crore as on July 22.

The MF industry ended July on a positive note. The AAUM increased from Rs. 36.98 lakh crore in June 22 to Rs. 37.77 lakh crore in July 22. Further, the industry added over 9 lakh folios.

Here are the other highlights that shaped the MF industry in July 2022:

Investor count - Around 1.85 lakh new investors started investing in mutual funds in July 2022. The total number of investors increased to 3.55 crore. This comprises 3.50 crore unique PANs and close to 5 lakh unique PEKRNs (PAN-exempt KYC reference numbers).

Folio count - The aggregate folio count grew up to 13.56 crore in July 2022 from 13.47 crore in June 22, an addition of 9.12 lakh folios. Of the total folios, 56% or 7.62 crore were from T30 cities.

T30 and B30 assets - Of the total industry AUM of Rs. 37.75 lakh crore, T-30 and B-30 cities formed 82% and 18%, respectively. As against June 22, T-30 assets increased from Rs. 29.27 lakh crore to Rs. 30.94 lakh crore. Likewise, B-30 assets jumped from Rs. 6.37 lakh crore to Rs. 6.81 lakh crore.





Average AUM per folio - The industry average AUM per folio across all investor categories increased from Rs. 2.65 lakh in June 2022 to Rs. 2.78 lakh in July 2022. The average AUM per folio of retail investors went up to Rs. 1.63 lakh in July 2022. The average AUM per folio of retail investors was Rs. 2.16 lakh and Rs. 95,000 in T-30 and B-30 locations, respectively.

SIP accounts - While investors started 17.42 lakh new SIP accounts, they discontinued 10.37 lakh SIP accounts in July 2022.

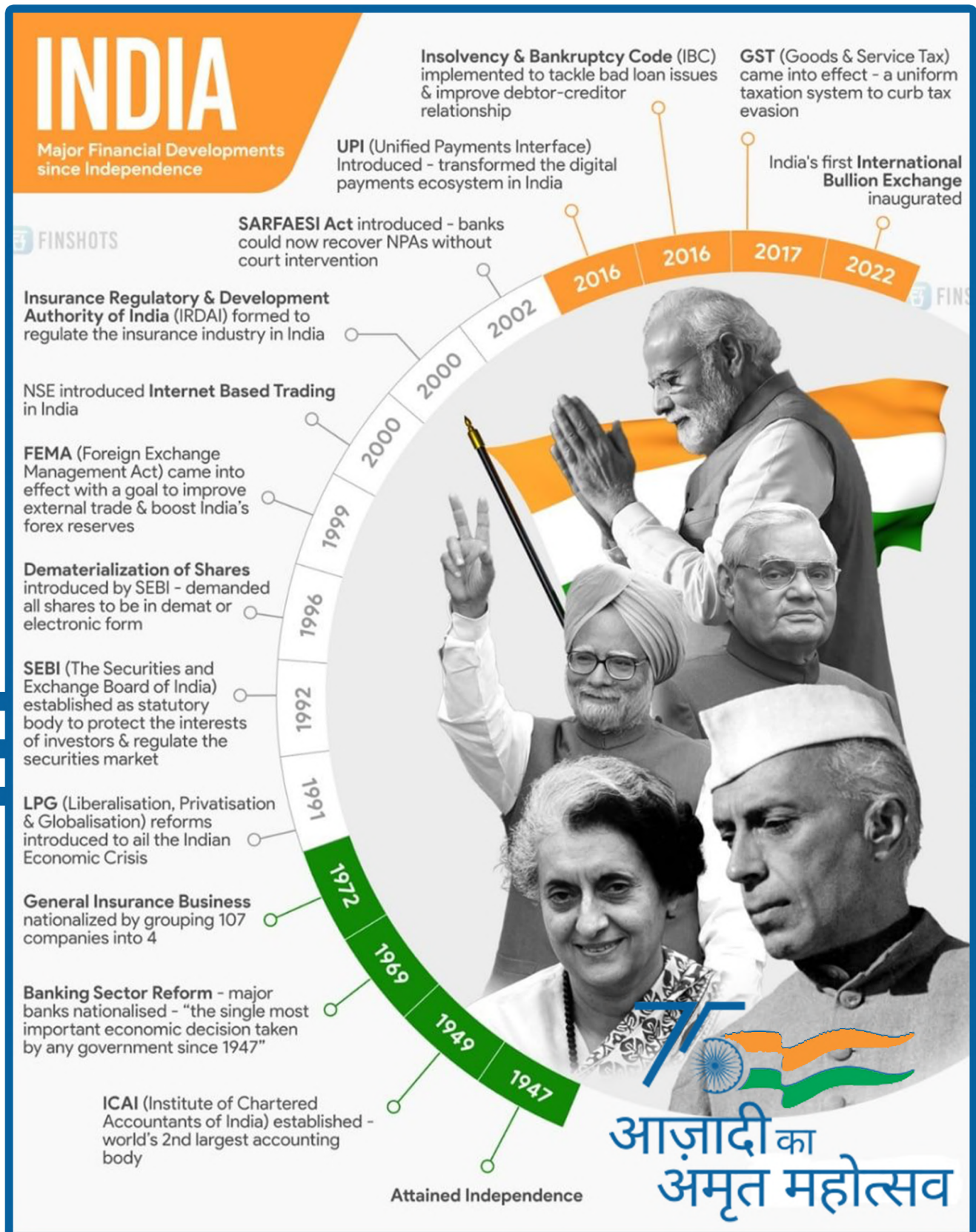
Overall, the total number of SIP accounts grew from 5.55 crore in June 2022 to 5.62 crore in July 2022. Of the total SIP accounts, the proportion of equity, debt and hybrid schemes were 85%, 3% and 6%, respectively.

Regular Vs direct plans - MFDs contributed 77% (Rs. 9,379 crore) of the total SIP collection of Rs. 12,140 crore in July 22. This hints at the confidence and comfort that investors have in their MFDs.

ARN/EUIN registration and renewal - 4,734 MFDs joined the MF industry. These include 1,820 individuals, 72 corporates, 2,840 corporate employees and 2 individual MFD employees. The majority of new ARNs were from Maharashtra (30.46%), Gujarat (10.44%) and Uttar Pradesh (7.94%).

Further, 7,023 MFDs renewed their ARN in July 22. These include 2,725 individuals, 148 corporates, 4,141 corporate employees and 9 individual MFD employees.

As on July 2022, there were 2.09 lakh ARN/EUIN holders. 57% of them are from T-30 cities.



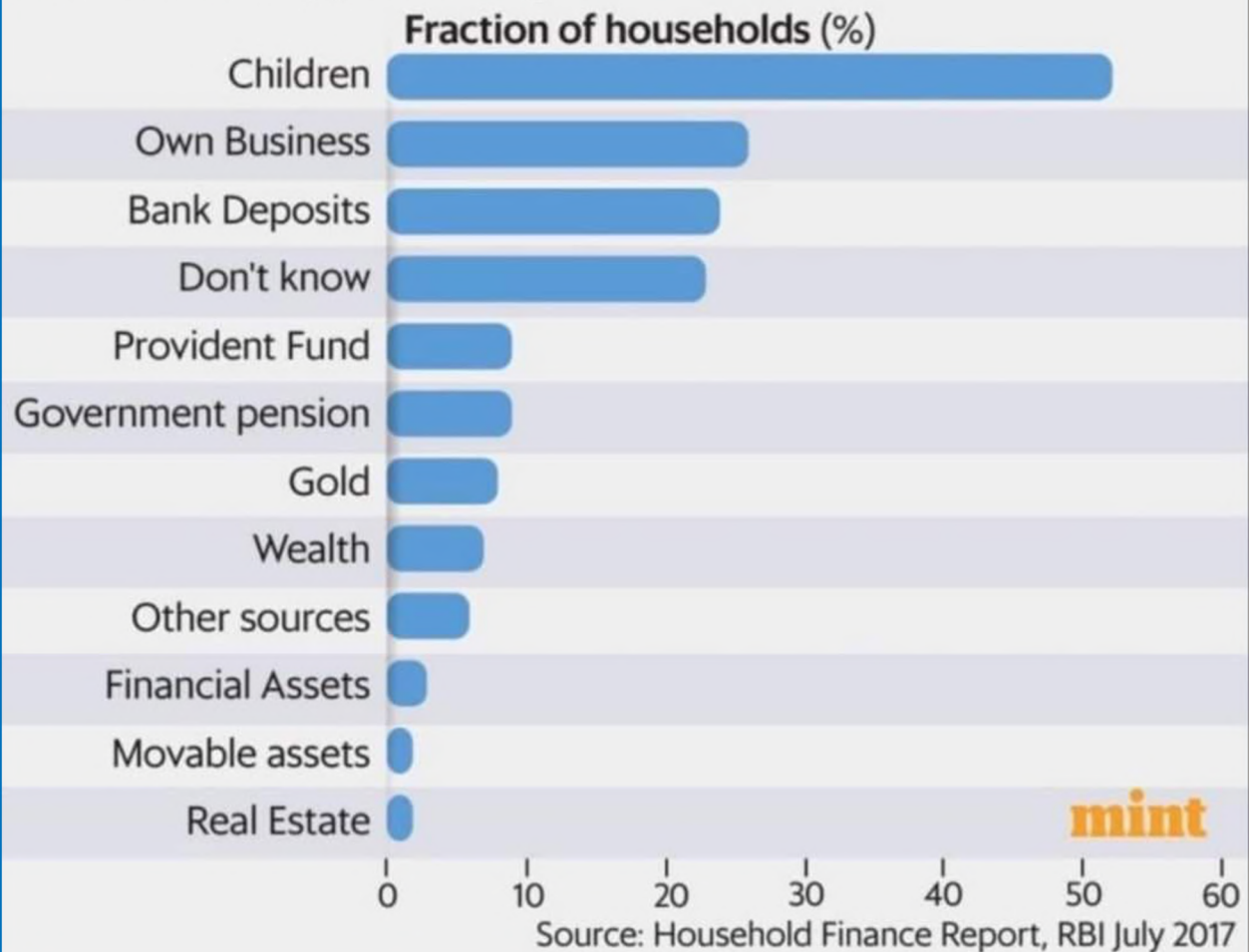


Global Central Bank Policy Rates

Country	Rate	Central Bank Rate (Today)	CPI YoY	Real Central Bank Rate	Last Move	Last Move Date
Switzerland	Target Rate	-0.25%	3.4%	-3.7%	Hike	Jun-22
Denmark	Deposit Rate	-0.10%	8.2%	-8.3%	Hike	Jul-22
Japan	Policy Rate Bal	-0.10%	2.4%	-2.5%	Cut	Jan-16
Eurozone	Deposit Rate	0.00%	8.6%	-8.6%	Hike	Jul-22
Thailand	Policy Rate	0.50%	7.7%	-7.2%	Cut	May-20
Sweden	Repo Rate	0.75%	8.7%	-8.0%	Hike	Jun-22
UK	Bank Rate	1.25%	9.4%	-8.2%	Hike	Jun-22
Norway	Deposit Rate	1.25%	6.3%	-5.1%	Hike	Jun-22
Hong Kong	Base Rate	1.25%	1.8%	-0.6%	Hike	May-22
Australia	Cash Rate	1.35%	6.1%	-4.8%	Hike	Jul-22
Taiwan	Discount Rate	1.50%	3.6%	-2.1%	Hike	Jun-22
South Korea	Repo Rate	2.25%	6.0%	-3.8%	Hike	Jul-22
Malaysia	Policy Rate	2.25%	3.4%	-1.2%	Hike	Jul-22
US	Fed Funds	2.38%	9.1%	-6.7%	Hike	Jul-22
Canada	Overnight	2.50%	8.1%	-5.6%	Hike	Jul-22
New Zealand	Cash Rate	2.50%	7.3%	-4.8%	Hike	Jul-22
Saudi Arabia	Repo Rate	3.00%	2.3%	0.7%	Hike	Jul-22
Philippines	Key Policy Rate	3.25%	6.1%	-2.9%	Hike	Jul-22
Indonesia	Repo Rate	3.50%	4.4%	-0.8%	Cut	Feb-21
China	Loan Prime Rate	3.70%	2.5%	1.2%	Cut	Jan-22
India	Repo Rate	4.90%	7.0%	-2.1%	Hike	Jun-22
South Africa	Repo Rate	5.50%	7.4%	-1.9%	Hike	Jul-22
Peru	Policy Rate	6.00%	8.8%	-2.8%	Hike	Jul-22
Poland	Repo Rate	6.50%	15.5%	-9.0%	Hike	Jul-22
Czech Republic	Repo Rate	7.00%	17.2%	-10.2%	Hike	Jun-22
Colombia	Repo Rate	7.50%	9.7%	-2.2%	Hike	Jun-22
Mexico	Overnight Rate	7.75%	8.0%	-0.2%	Hike	Jun-22
Russia	Key Policy Rate	8.00%	15.9%	-7.9%	Cut	Jun-22
Chile	Base Rate	9.75%	12.5%	-2.8%	Hike	Jul-22
Brazil	Target Rate	13.25%	11.9%	1.4%	Hike	Jun-22
Turkey	Repo Rate	14.00%	78.6%	-64.6%	Cut	Dec-21
Argentina	Benchmark Rate	60.00%	64.0%	-4.0%	Hike	Jul-22

Sources of funds in retirement

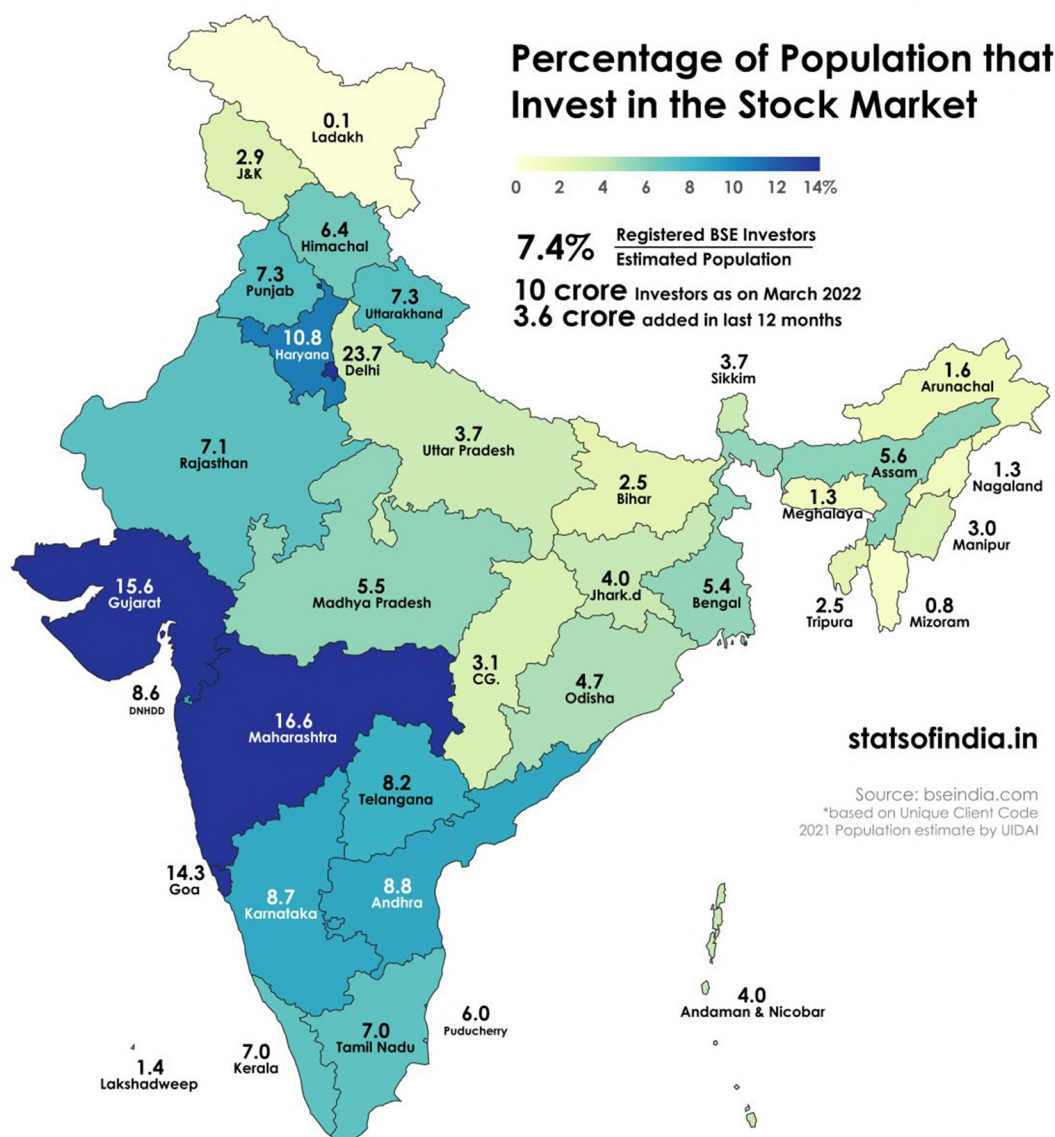
Over half of Indian households depend on their children for financial support during retirement.





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Saarathi Zaroori Hai®



What percentage of population invests in the stock markets? **7.4%**
 Delhi **23.7%**
 Maharashtra **16.6%**
 Gujarat **15.6%**

WE ARE OPEN TO CONTRIBUTIONS FROM OUR VALUED MEMBERS!

The editor is open for interesting contributions from our members. It can range from IAP programme snapshots or pictures/snippets of fun events conducted for investors, to fun anecdotes as well as any valuable inputs you would like to share! Please write to nisreen@moneyworks.co.in to get featured in our next edition.



MEMBERSHIP RENEWAL

*Requesting members to make the renewal payment
for this Financial Year 2022-23.*

*Also appreciate those members who have not yet paid
their outstanding fees to do so at the earliest.*

YOU CAN MAKE THE PAYMENT THROUGH OUR

Website: www.fifaindia.org

Username: your registered email id

Password: pass@123

You can also download the **GrowFa App** from **Google Play Store** and make the payment.

In case if you face any difficulty, please email the query to **accounts@fifaindia.org** or get in touch with **Ronald** on mobile number **+91 98675 08393**.



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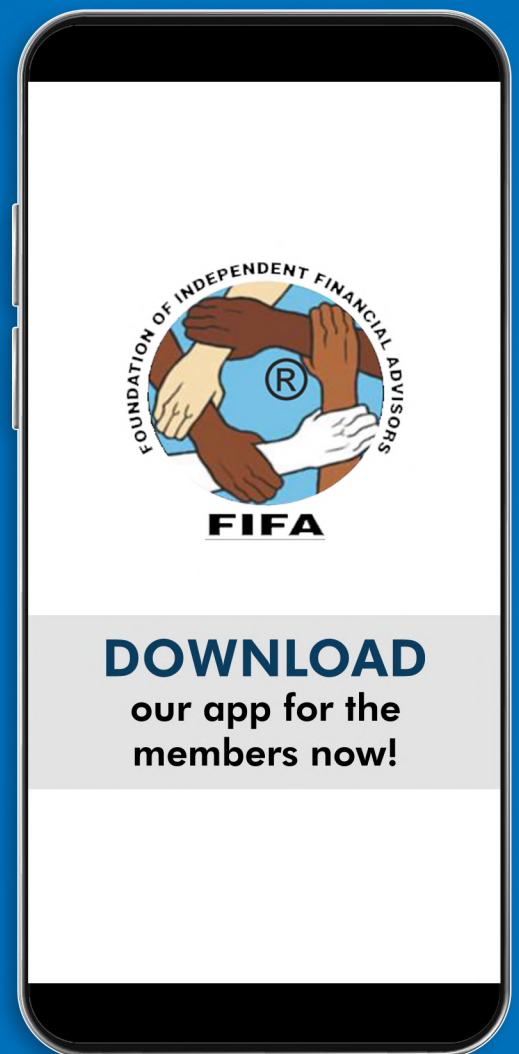
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