



FIFA

FOUNDATION OF INDEPENDENT FINANCIAL ADVISORS



Saarathi Zaroori Hai®

FIFA September 2022

We are proud to announce
new members of FIFA



 **Saarathi Zaroori Hai®**



**KARTIKEY
CHANDRAKANT NIRMAL**

Kartikey Chandrakant Nirmal

General | Ind | Surendranagar | O2411



**SHIVAKUMAR PARAKKAT
KIZHUPALANGHA**

Shivakumar Parakkat Kizhupalanghat

General | Ind | Bangalore | O2412



SUBHRADIP BHOWMICK

Esbee Sharpe Investment Services

General | N.Indv | Kolkata | O2413



HEMIS VIKRAM KOTHARI

Hemis Vikram Kothari

General | Ind | Mumbai | O2414



**VIJAY RAVINDRANATH
JAVALGEKAR**

Vijay Ravindranath Javalgekar

General | Ind | Solapur | O2415



On **3rd Sept 2022**, Saurashtra Kutch Independent Financial Advisors Association (SKIFAA) Rajkot had invited **Ms. Roopa Venkatkrishnan** to conduct knowledge sharing session.

There were more than **275 IFAs** who attended the session from 21 cities.

Topic by Ms Roopa Venkatkrishnan :

“Opportunities for MFDs in MF Industry”



Guest Speaker

Roopa Venkatkrishnan
FIFA Secretary



 **Saarthi Zaroori Hai®**



WEALTH HEALTH.IN
ENSURING WEALTH. INSURING HEALTH.

Invitation to an
exclusive interactive seminar



ATTAINING FINANCIAL INDEPENDENCE



Sunday, 25th Sept, 2022



10.00 am onwards



Venue:

La Banq,
R - Odeon Mall, 2nd Floor, Ramnarayan
Narkar Marg, Ghatkopar (e), Mumbai,
Maharashtra - 400 077, INDIA.

Followed by Lunch

Register Now

Link in the description

+91 93238 01010
www.wealthhealth.in
sanjay@wealthhealth.in



Organised by:
SANJAY M. MEHTA

AMFI-Registered
Mutual Fund Distributor

On **25th Sept 2022**, Mr. **Sanjay Mehta General Member** of FIFA
had organised knowledge sharing programme in Mumbai.

Ms. Roopa Venkatkrishnan was the speaker for this session.

There were more than **112 IFAs** who attended the session.

Topic :
"Attaining Financial Independence"



Mr. Prasad Fadnavis from "Ved Fortune Vision Pvt Ltd" Nagpur has conducted Investor Awareness Programmes on 23rd July 2022/1st Aug 2022 & 8th Aug 2022 in Hyundai Sales / Service / Bodyshop Depts in Amravati / Chandrapur / Nagpur.

There were more than **230 employees** of Hyundai who attended the session.



Please find an email from Mr. Sanjay Mehta, Mumbai

"Knowledge is like money: To be of value it must circulate, and in circulating it can increase in quantity, and hopefully, in value"

Being a part of FIFA, I feel like I am in the right place. I would like to thank FIFA for providing knowledge, guidance, and support to independent advisors/MFD like us. Your education sessions as well as key updates on the policies and regulations have really helped us to serve our clients better. With myriad changes taking place in the government, SEBI, AMFI & RBI policies, as well as with different AMCs, FIFA has provided a comfortable landing cushion and helped in providing the right direction to make conscious decisions. With the full support of Mrs. Roopa Venkatkrishnan and FIFA, we at Wealth Health conducted an education seminar **Attaining Financial Independence** on the 25th of September at Ghatkopar Mumbai. Mrs. Roopa Venkatkrishnan, honorary Secretary of FIFA was kind enough to be our Guest Speaker for the seminar. Mrs. Roopa despite her busy schedule had given personal meetings to discuss the points to be included in the sessions. She was always patient and provided guidance during the entire process.

In spite of having her personal commitment to her new office inauguration the very next day of the session, she gave our session priority. I am really thankful to Mrs. Roopa for taking the time out for us and providing individual investors guidance on points to consider while investing. After successfully conducting this session with more than 100 participants, we received a lot of positive feedback from the attendees for the session.

I would encourage MFD like me to be a member of FIFA and also encourage other advisors to be a part of FIFA. We highly recommend being a part of this wonderful organization. The amount of insights and guidance that the foundation is providing us out beats their membership fees. We have benefited a lot from their sessions in the past years, and I am sure everyone will benefit from them too. Thanks once again to FIFA and Roopa Madam.

Regards,
Sanjay Mehta

FIFA September 2022

Token of Gratitude



 **Saarthi Zaroori Hai®**

Please find an email from Mr. Jay Shah, Mumbai

It's a pleasure to announce that One tree hill Prime Wealth has achieved a milestone of doing business of INR100 crores , under the guidance of the FIFA team. A special mention to Mrs Roopa Venkatkrishnan for her mentorship and going out of her way to impart knowledge.

Best
Jay

From General Member, Mr. Naresh Desai - Vapi



Today had an opportunity to meet powerhouse for all MFD and retail investor's **Mr. Sanjaybhai**. Inspite of managing huge AUM he is grounded person and ready to help any MFD.

Thanks Sanjaybhai for providing me your valuable time and inputs, you made my day.



FIVE MAJOR DIRECT PLAN PLATFORMS MANAGE AUM OF RS.48,600 CRORE IN MUTUAL FUNDS

Zerodha is the largest player among all the direct plan platforms with assets of Rs.18,000 crore as on March 2022. India's five major direct plan players – Coin (Zerodha), ET Money, Groww, Kuvera and Paytm Money managed AUM of Rs.48,600 crore as on March 2022, shows the MFDex data, which accounts for 95% of the industry data. These players account for 40% of the total AUM of India largest distributor - SBI.

Data shows that Coin by Zerodha has the highest AUM of Rs.17,900 crore as on March 2022. Zerodha saw its AUM go up by 91% from Rs.9400 crore in March 2021.

Groww ranked second in terms of AUM among direct plan players. Its AUM went up by a whopping 190% (highest growth in % terms) to reach Rs.12,000 crore in March 2022.

Kuvera followed Zerodha and Groww for the third rank with AUM of Rs.7100 crore. Paytm Money and ET Money have AUM of Rs.5800 crore each in March 2022.



Distributor Name	Mar-22	Mar-21	Change
Zerodha	17,862.33	9,361.42	91%
Groww	12,035.23	4,153.92	190%
Kuvera	7,113.74	4,381.50	62%
Paytm Money	5,817.40	3,666.80	59%
ET Money	5,778.05	3,202.60	80%

Interestingly, both Zerodha and Groww made it to the top 20 list of distributors in terms of AUM. While Zerodha ranked 14th, Groww secured the 20th position in the top 20 list of India's largest distributors by assets.

Overall, SBI has maintained its top standing on the AUM front. SBI managed assets of Rs.1.23 lakh crore as on March 2022.

NJ India, HDFC Bank, Axis Bank and ICICI Bank were the distributors in the top 5 highest AUM list.



Rank	Name of the ARN Holder	AUM for FY 2021- 22 Rs. In crore
1	State Bank of India	123800.58
2	NJ IndiaInvest Pvt Ltd	109295.86
3	HDFC Bank Limited	84454.69
4	Axis Bank Limited	53465.90
5	ICICI Bank Limited	47682.77
6	ICICI Securities Limited	47526.92
7	Prudent Corporate Advisory Services Ltd	45625.27
8	Kotak Mahindra Bank Limited	38605.61
9	IIFL WEALTH PRIME LIMITED	25662.44
10	Citibank N.A	24124.78
11	Hongkong & Shanghai Banking Corporation Ltd.	21035.14
12	Julius Baer Wealth Advisors (India) Private Limited	20007.16
13	Standard Chartered Bank	17970.56
14	ZeroDha	17,862.33
15	Darshan Services Private Limited	17742.76
16	ANAND RATHI WEALTH LIMITED	16925.16
17	Aditya Birla Finance Limited	13433.21
18	QWIK SUPPLY CHAIN PRIVATE LIMITED	12347.67
19	JM Financial Services Limited	12051.72
20	Groww	12,035.23

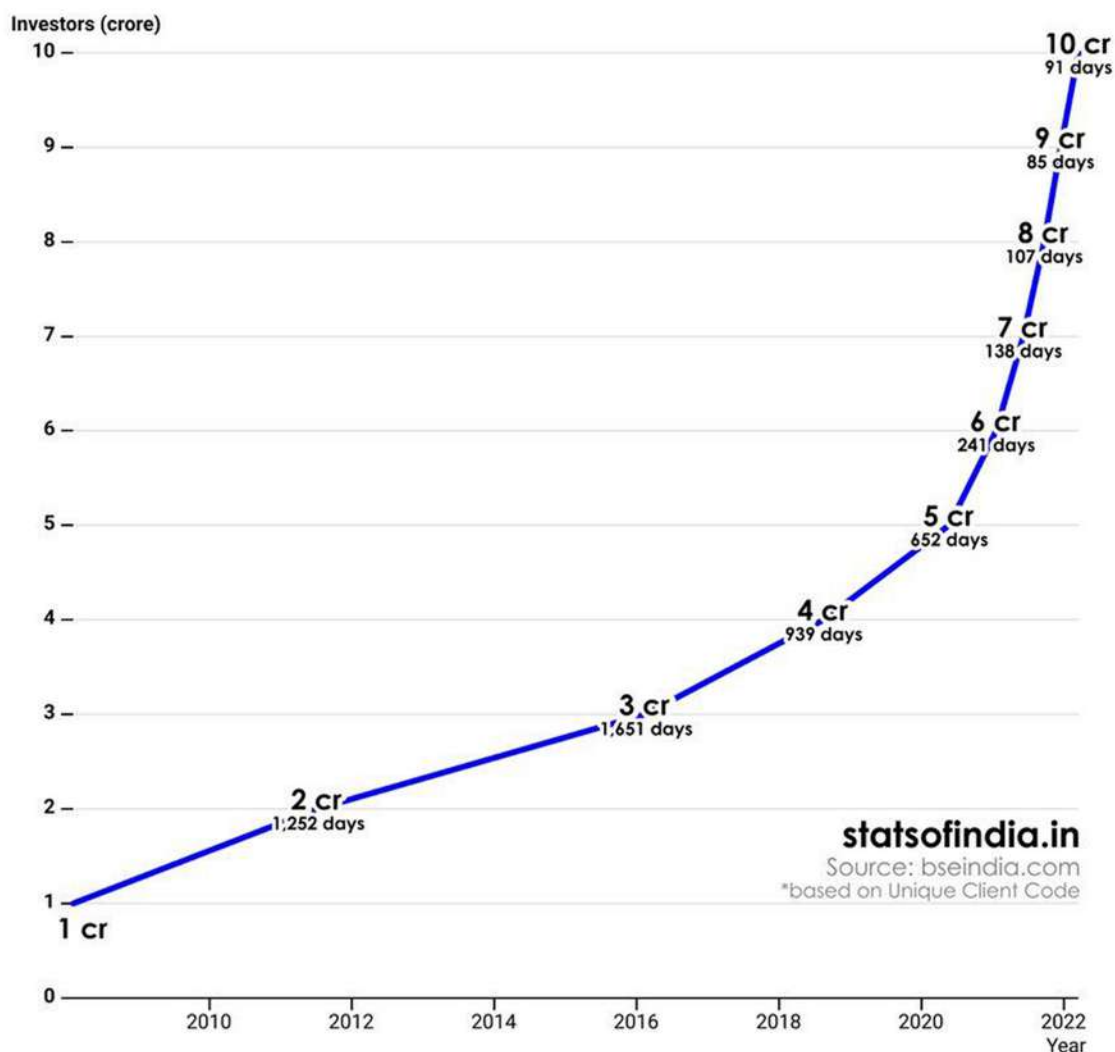


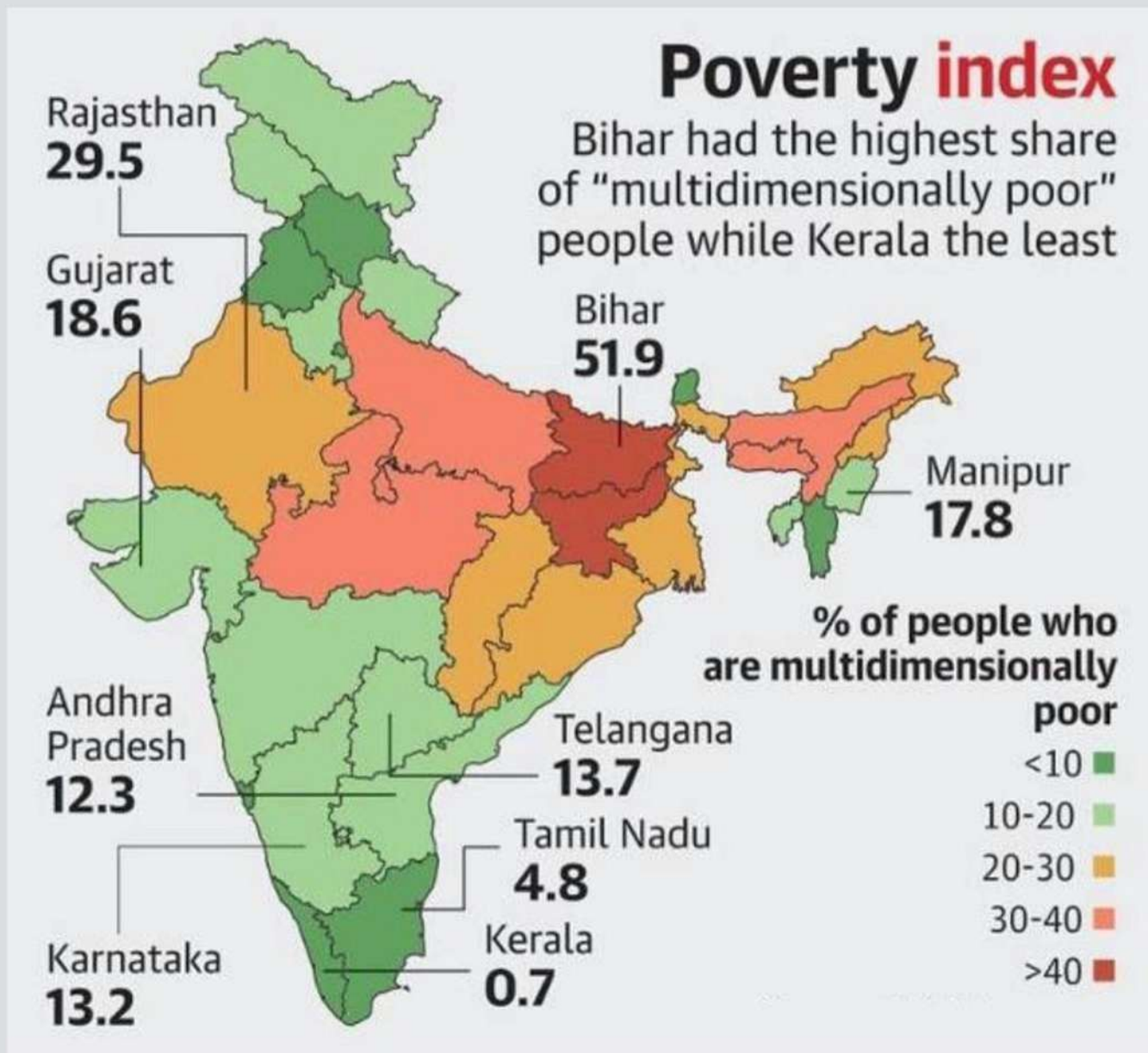
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Saarthi Zaroori Hai®

10 crore registered investor accounts on BSE







WealthDesk

Evolution of NIFTY 50 over the years



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**.



CONTACT DETAILS

Contact Person:

Ronald Mendonca

Contact number: 98675 08393

📍 Address:

Foundation of Independent Financial
Advisors, 16A, 16th Floor, Nirmal
Building, Nariman Point,
Mumbai : 400 021



Website:

www.fifaIndia.org

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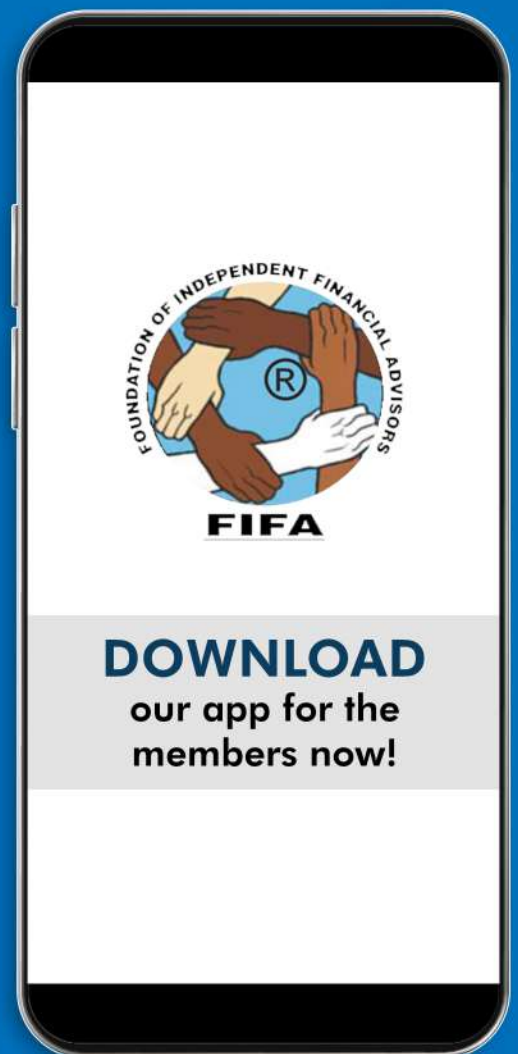
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GrowFa App link:

<https://play.google.com/store/apps/developer?id=Ezeelink+Pte>