
# WEALTHBID CONSULTING & RISK ADVISORY (P) LTD.

*(A Special Purpose Vehicle (SPV) Formed for Fund Management and Wealth Management)*

**Promoter : Adv. Naresh Bansal | Punit K. Bansal | C.A. Tarun Bansal**

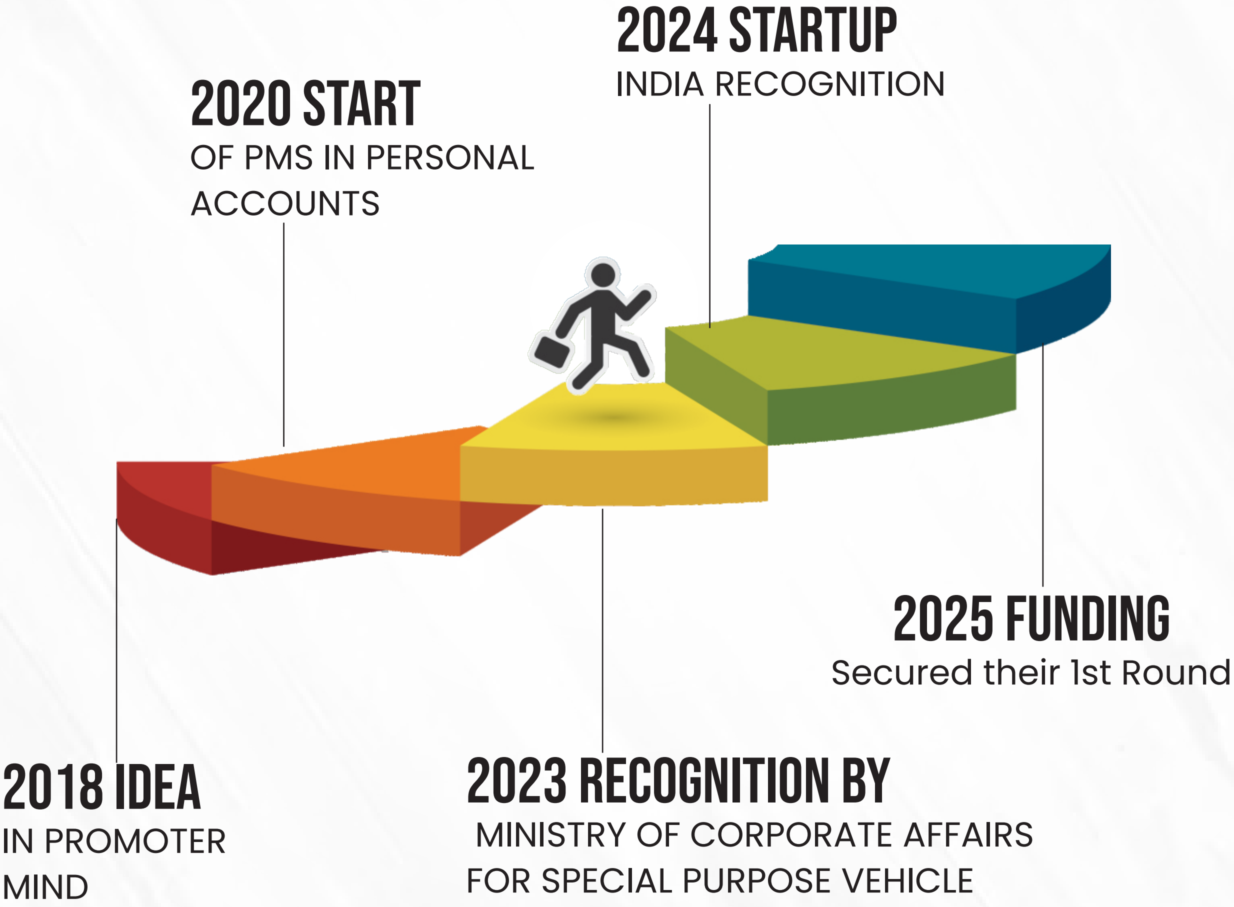
**98121-58032 99923-06003 99539-53696**

# ABOUT US

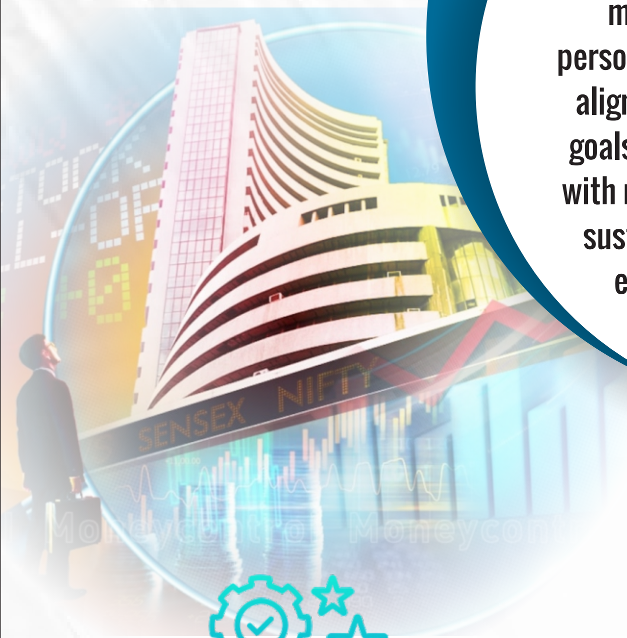
Wealthbid Consulting and Risk Advisory is a forward-thinking asset management company established in 2023 by a collective of professionals and highly experienced portfolio managers. Wealthbid aims to be a trusted partner for individuals and institutions seeking long-term, disciplined financial growth.

As a registered **Startup India** entity, we operate with a vision rooted in transparency, compliance, and client-first ethics. Currently on the path to securing our **NBFC license** and **SEBI registration**, we are strengthening our regulatory framework to deliver services that meet the highest standards of accountability and governance.

# OUR GROWTH JOURNEY




*Empowering Growth, Minimizing Risk, Maximizing Trust*




## OUR VISION & VALUES

To create forward-thinking asset management solution that are personalized, performance-driven, and aligned with every client's financial goals. We aim to combine innovation with reliability to help investors build sustainable wealth in a constantly evolving financial ecosystem.

# OUR OBJECTIVES

### DELIVER CONSISTENT AND SUSTAINABLE RETURNS

To design and manage investment strategies that generate stable, long-term returns while maintaining a disciplined approach to capital protection.

### PROMOTE CLIENT-CENTRIC FINANCIAL SOLUTIONS

To understand every client's unique goals, risk profile, and financial aspirations, and provide personalized solutions that align with their long-term vision.

### UPHOLD THE HIGHEST STANDARDS OF COMPLIANCE

To operate with complete transparency and adhere to regulatory frameworks as we progress toward NBFC licensing and SEBI registration.

### ENHANCE FINANCIAL LITERACY AND AWARENESS

To empower investors by simplifying complex financial concepts and enabling informed, confident investment decisions.

# GUIDING MINDS BEHIND WEALTHBID

At the heart of Wealthbid's journey stand three accomplished leaders whose combined expertise shapes our strategic vision and strengthens our operational excellence.

**Mr. Naresh Bansal, Director Legal Head,** brings deep knowledge of regulatory frameworks and compliance, ensuring every decision aligns with legal integrity and transparency.

## MR. NARESH BANSAL **(Director Legal, Advocate)**

ensures regulatory strength as the Legal Head, maintaining strict compliance across all functions.
with over 30 year of experience in legal & Regulatory framework.

## MR. PUNIT BANSAL

**(Director - Financial Advisor , MBA- Finance)**

Director & Investment Advisor, leads with sharp market insight and a strong analytical approach, crafting investment strategies designed for performance and long-term value creation.

## MR. TARUN BANSAL, CA

**(Director - Strategic Hedge Advisor)**

Director & Finance Head, oversees financial planning and corporate governance, driving prudent management and sustainable growth.

Together, they form a leadership team dedicated to building trust, driving innovation, and guiding Wealthbid toward a future of stable and intelligent wealth management.

# OUR SERVICES

At Wealthbid Consulting and Risk Advisory, we offer a comprehensive suite of wealth-building and risk-mitigating financial solutions designed to meet the evolving needs of individuals, families, and enterprises. Our services are crafted with precision, backed by deep market expertise, and tailored to deliver sustainable long-term value.

1

## PORTFOLIO MANAGEMENT SERVICES (PMS)

Customized, research-driven portfolios designed to optimize returns, manage risk, and align with client-specific financial goals.

2

## STRATEGIC ASSET MANAGEMENT SERVICES

Holistic asset allocation models that balance growth, liquidity, and stability through disciplined and diversified investment strategies.

3

## ALTERNATE INVESTMENT FUND (AIF) SOLUTIONS

Access to high-potential alternative investments, including private equity, debt, and structured products- curated for informed and ambitious investors.

4

## PERSONALIZED RISK ADVISORY SERVICES

End-to-end risk assessment and mitigation strategies tailored to individual financial profile, ensuring informed, confident decision-making.

5

## MUTUAL FUND, ETF & HYBRID FUND DISTRIBUTION

Guided selection of top-performing mutual funds, ETFs, and hybrid funds backed by in-depth analysis and market insights.

6

## PERSONALIZED HEDGE ADVISORY SERVICES

Advanced hedging strategies to protect portfolios from volatility, safeguard capital, and enhance returns in dynamic markets.

7

## TAX ADVISORY SERVICES

Comprehensive tax planning and structuring solutions to minimize liabilities and enhance overall financial efficiency.

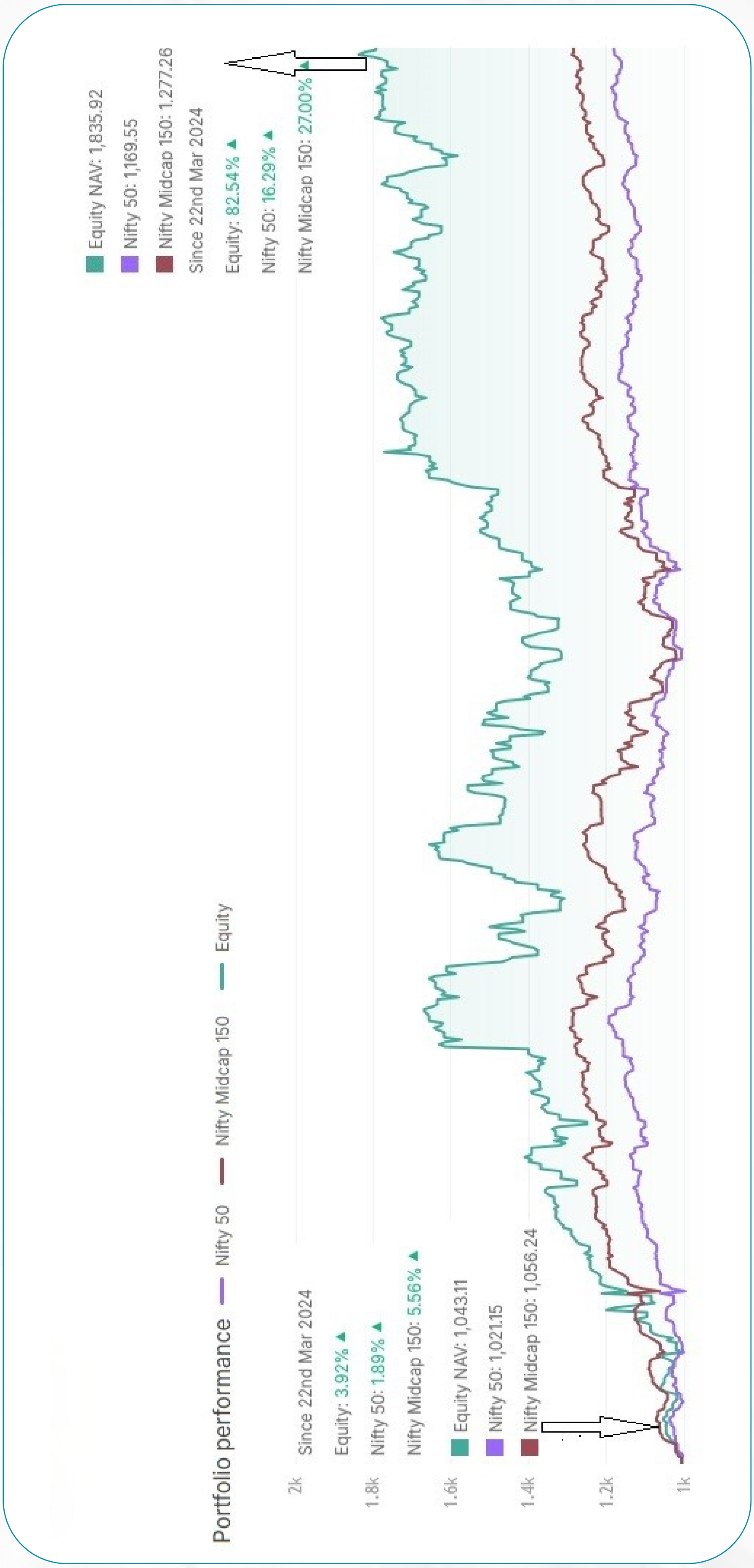
8

## CORPORATE ADVISORY SERVICES

Strategic financial guidance for businesses, including capital structuring, compliance support, valuation insights, and long-term growth planning.

**Disclaimer:** Services are provided on a private and confidential basis to a closed group of clients and are not intended for public distribution. Investments are subject to market risks and no returns are guaranteed.

Wealthbid
INVEST | HEDGE | GROW | BUILD



# PORTFOLIO PERFORMANCE

The chart presents a comparative performance analysis of the Wealthbid Equity Portfolio versus two key market benchmarks—Nifty 50 and Nifty Midcap 150—from 22nd March 2024 to the present.

## Starting Point

All three lines—Equity (green), Nifty 50 (purple), and Nifty Midcap 150 (maroon)—begin around the 1,000 NAV level, indicating a normalized base for fair comparison from day one.

## Portfolio Performance Path

The portfolio experiences healthy volatility, typical of actively managed equity baskets, but maintains a clear upward trajectory throughout the period.

The Wealthbid Equity Portfolio (green line) quickly begins outperforming both indices, showing stronger upward momentum and wider fluctuations due to active management.

## Benchmark Movement

- Nifty 50 shows a moderate and steady rise over time, ending with around 16.29% growth.

- Nifty Midcap 150 delivers stronger performance among benchmarks, closing at approximately 27.00% growth, consistent with the broader midcap market rally.

## Current Position

The Wealthbid portfolio reaches an Equity NAV of 1,835.92, reflecting a remarkable 82.54% increase since inception—significantly outperforming both benchmarks.

## Overall Insight

This chart demonstrates that the actively managed Wealthbid equity strategy has:

- Consistently outperformed major Indian indices
- Delivered superior compounded returns
- Managed volatility effectively
- Achieved exceptional growth compared to both Nifty 50 and Nifty Midcap 150

In summary, the performance reinforces the strength of Wealthbid's investment strategy, research-driven stock selection, and disciplined portfolio management.

# Wealthbid

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support@wealthbid.in

223-A, New Grain Market, Hisar


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