



Money  
Mantra

We Care For Your Money..!



**Mr. Viral Bhatt**

Young Achiever's Award 2020

# WE CARE FOR YOUR **MONEY**..!

We at Money Mantra guide you in your  
personal finance journey

[www.moneymantra.info](http://www.moneymantra.info)



# About us

Money Mantra offers a unique approach to help you reach financial success. Your financial growth is the most important aspect of our business.

However, **financial security** does not happen by accident. You spend long hours making yourself professionally successful, but often have little time to plan or fully understand where or how to best invest your individual wealth or retirement savings. **Financial security, tax reduction & inflation protection** - all takes **time to plan** and **expert knowledge** to successfully achieve it.

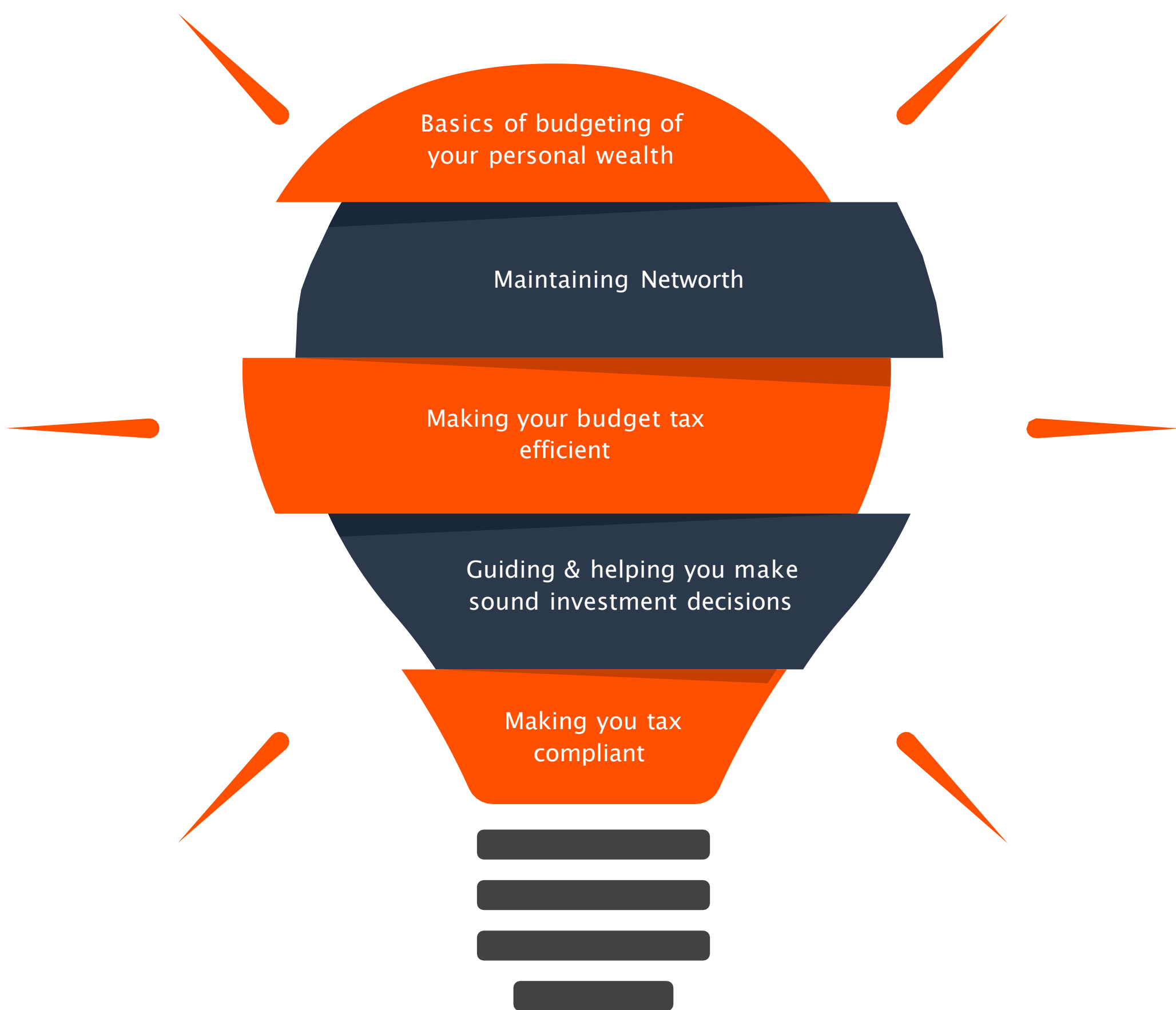
This success is necessary today to guarantee your future, your business's future, and the future of all those who depend on your investment decisions.

We're committed to being informed, educated, & experienced in managing your financial affairs, always.



# Our Modus Operandi

We operate in such a way that your current and future savings are aligned with your futuristic aspirations.



**We set your finances on a growth oriented fast-track investment portfolio**





# Money Mantra

## Our Services

**01** Mutual Fund

**04** Direct Equity

**02** Insurance

**05** Loan Service

**03** Fixed Income

**06** Tax Planning



# Mutual Fund

One should never invest in **Mutual Funds** but should invest through them.



You all invest in various investment avenues basis your requirements.

For example,

- i. For the goal of Capital Growth - many invests in Equity Shares.
- ii. For safety of Capital & regular income - many invests in fixed income products.

The key is, how to know which instrument is the best for them?

Don't have the time to research?

[CONTACT US](#)



# Insurance



We help our customers with both life and non-life insurance products to cut on risks and perils. Our services extend to policies like life insurance term plans. We can also help you with your general insurance policies like medical, accident, travel, home and other insurances.

Don't have the time to research?

[CONTACT US](#)





# Fixed Income

Wish to earn fixed returns on your investments?



**Twin benefits of Returns & Assurity**

We do fixed income products like Bonds, Government Securities, Debentures and P2P(Peer to Peer landing).

**Don't have the time to research?**

**CONTACT US**



# Direct Equity



Money Mantra in collaboration with Angel One (Angel Broking) offers a safe, seamless, online share trading platform. This stock trading application helps in tracking your direct stock investments online.

Don't have the time to research?

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# Loan Services

We provide you with the best loan advisory services and make it hassle-free for you. We will help and assist you in the most optimal way.



**01 Home Loans**

**02 Balance Transfers**

**03 Personal Loan**

**04 Business Loan**

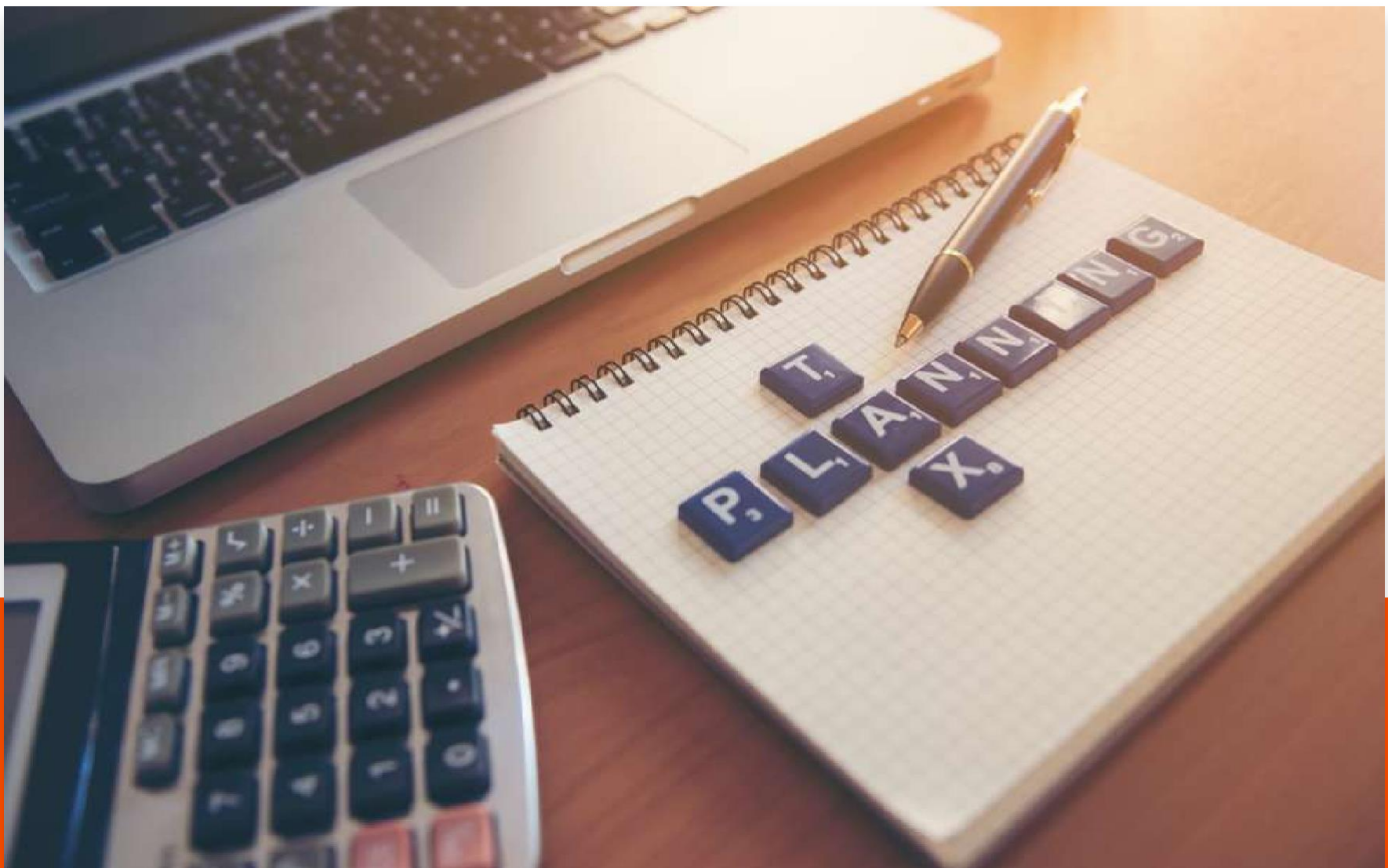
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# Tax Planning

Manage your personal finance in the most tax-efficient manner with the help of tax-planning services offered by **Money Mantra**



- 01** Analysis of taxes by experts
- 02** Instant tax advisory service
- 03** Income Tax Return Filing
- 04** Tax-saving investment options

Don't have the time to research?

[CONTACT US](#)





# How do we work ?

STEP  
**01**

## Register with us.

Simply begin by filling an easy form online. Our website protects your privacy and your information is safe with us.

## Risk Assessment

Periodic risk assessment to minimise risk to your portfolio and readjusting the portfolio according to macroeconomic trends and patterns.

STEP  
**02**

STEP  
**03**

## Manage Goals

We will help you assess your goals and assign financial priorities.

## Portfolio Creation

A financial portfolio unique to your goals will be created which comprises of asset classes suited to your risk profile, goals and lifestyle and needs.

STEP  
**04**

STEP  
**05**

## Save More Money

Our consultancy and expertise in financial product selection will also help add to your savings.



# Our Founder



**Mr. Viral Bhatt**, who developed a keen interest in tracking and understanding of financial markets, macroeconomic concepts right from his teens, decided to pursue a career in the finance space right from the beginning. He took the first step by completing “Certified financial planning” from an International college of financial planning in 2007.

He has worked in various domain’s under the financial umbrella at Bajaj Capital and Karvy wealth, before taking an entrepreneurial leap in partnership with his colleague. Starting something on his own was always on his radar, and it finally materialized in 2014, when he started Money Mantra, his venture which helps clients to attain financial well-being.

He kept on adding skillsets on the way by attaining specialized certifications from various industry bodies such as-  
Derivatives and capital markets – NISM  
Retirement readiness certification – NISM  
Certification on Insurance – IRDA

In an industry where miss-selling, unfortunately, is a common phenomenon, and mutual funds are sold as just products without keeping the bigger picture in mind, Viral set out to create a differentiation. He set an example and demonstrated that financial advice has to be selfless and attaining clients goals has to be given the utmost importance. He also pioneered the use of technology and social media amongst personal finance professionals which helps him to keep in touch with his clients on a regular basis and educating them on important aspects

He is also part of an elite industry body – Network FP, where he has lead various task forces and brought about innovations beneficial to the fraternity at large.

His achievements were noticed by eminent publications across the country, who approach him to seek his views on important financial events. Viral can often be seen in television channels like zee business, CNBC Bajar, and Money9 and also in various newspapers like economic times, free press journal, Mint, the business standard for his advice and views.



# Testimonial



Trustworthy, genuine & ethical - are the three words that comes to my mind thinking of Mr. Viral Bhatt.

**Mr. Saumil Parmar**



His advice has helped me in making my investment decisions better. His thoughtful words = growth of your money.

**Mr. Krishna Jadeja**



Services of Money Mantra have been instrumental in coming up with a comprehensive goal-based investment plan for me. It's been 8+ years that I've been visiting Mr. Viral Bhatt.

**Satyen Pandey**



Anything related to Finance or Investments, Viral Bhatt is the man I look forward to.

**Sandeep Kotak**

What Our  
**Clients Say**



# Money Mantra

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