



# Shivranjani Securities Co. Pvt. Ltd

## Corporate Profile

Secure Your Wealth with Trusted Financial Planning



AMFI-Registered Mutual Fund Distributor

# A Cornerstone of Financial Guidance in Goa

**1992**

Year of Establishment

**VIMSON Group**

An integral part of the  
distinguished conglomerate  
spearheaded by  
Mr. Shivanand V. Salgaocar.



**₹1,000+ Cr**

in Assets Under  
Management (AUM)



**2,000+**

Satisfied Clients



**20+ Years**

Industry Experience

Proudly ranked among the **Top 3** Mutual Fund Distributors in Goa and **Top 200** Pan-India.

# Core Investment Services

*A diverse portfolio of financial instruments, catering to every investor profile.*



## Mutual Funds

SIPs, STPs & lumpsum strategies for every risk profile



## Equity & Derivatives

Equity trading and derivatives facilitation for growth-oriented investors



## Portfolio Management (PMS)

Customised portfolios managed by seasoned experts



## NRI Advisory

Cross-border portfolio management and full compliance support



## Beyond Public Markets

Alternate investments for diversification beyond markets



## Insurance & Protection

Life, health & general insurance for complete peace of mind



# Our Services. Your Financial Advantage.

| SERVICE                     | OBJECTIVE                                       | INSTRUMENT                  | OUTCOME                             |
|-----------------------------|-------------------------------------------------|-----------------------------|-------------------------------------|
| Personal Financial Planning | Goal-based income & expense management          | Custom Roadmaps             | Confidence & Security               |
| Smart Tax Planning          | Structuring finances for tax-efficient planning | Long-term structures        | Tax-efficient financial structuring |
| Dedicated NRI Consultation  | Cross-border portfolio management in India      | Full compliance & reporting | Complete Peace of Mind              |
| Alternate Investments       | Diversification beyond traditional assets       | AIFs, PMS & PE              | Potential for diversified growth    |
| Insurance & Risk Protection | Securing family and financial goals             | Life, Health & General      | Financial Security                  |

# The Shivranjani Advantage Matrix



## Pedigree & Trust

### VIMSON Group Backing

The trust and legacy of one of Goa's premier business groups ensures reliability and long-term commitment.

### Proven Track Record

25+ years of consistent client satisfaction and portfolio performance across market cycles.



## Reach & Expertise

### Local Expertise, National Reach

Deep Goan market knowledge combined with pan-India research and investment capabilities.

### SEBI Registered & Compliant

Fully compliant with regulatory requirements, providing clients with complete peace of mind and transparency.



## Personalization

### Curated Approach

One-on-one curated discussions with dedicated relationship managers who understand your financial journey.

### Holistic Financial Planning

From first investment to retirement planning — a complete financial partner for life's milestones.

Empowering **Wealth**. Enabling **Futures**.

# Our Disciplined Approach to Building Long-Term Wealth

## 04 Continuous Monitoring

We regularly review your portfolio, track performance, and assist in strategic rebalancing.

## 03 Empowering Guidance

We demystify every recommendation in simple terms, allowing you to make informed decisions with total confidence.



## 01 Understanding Priorities

We map your goals, risk tolerance, time horizon, and concerns to build a strong foundation.

## 02 Designing Portfolios

We construct a well-balanced Mutual Fund portfolio precisely aligned with your long-term objectives.



# What Our Clients Gain

Every engagement is built on a client-first philosophy — not a product-driven agenda.



## Goal-Based Planning

Your financial plan is engineered around your life milestones — retirement, education, home, portfolio transfer.



## Risk Management

Multi-asset diversification and disciplined SIP strategies protect your wealth against market turbulence.



## Personalized Consultations

A dedicated relationship manager who knows your family, your goals, and your risk appetite.



## Tax Efficiency

Structured solutions that legally minimise your tax burden and maximise net wealth accumulation subject to applicable tax law.



## NRI Expertise

Full-service cross-border portfolio management with FEMA/DTAA compliance and repatriation support in coordination with qualified legal and tax professionals .



## Alternate Growth

Access to AIFs, PMS and Private Equity — premium instruments previously reserved for institutions.

## Disclaimer

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————— **“Mutual Fund investments are subject to market risks. Read all scheme related documents carefully.”.** —————



# Begin Your Financial Journey

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**We look forward to partnering together**