

PROFILE



The Company

Jigar Vaid is the founder of Moneyplant Finvest with over 24 years of experience in the capital market as an investment advisor. He is a registered sub-broker of BSE & NSE. He was looking at more challenging opportunities to expand his brokerage business and formed Moneyplant Finvest in 2008. The company is a brainchild of Jigar and Jignya Vaid. Jignya is also a part of capital market as registered sub-broker of BSE and NSE since 2001. She is M.COM with masters in Economics and AMFI certified mutual fund advisor.

Making the service offering more robust, Moneyplant Finvest has an association with NJ India Invest, one of the largest mutual fund distributors in the country as well as equity franchisee with Sunidhi Securities & Finance Ltd one of a leading broking firm.

We provide an exclusive Mobile application and online platform to view and transact in mutual fund. This makes life more easy & convenient.

Today Moneyplant Finvest has strong team and has more than 1200+ satisfied clients including HNI, corporate, retail and NRI.



Our Service Offering

We understand no two individuals are alike and hence tailor-make our investment strategy and plans to meet your different needs. In simple words, we partner you with your financial planning & investment decision to manage your life priorities.

Our area of expertise spans across the following products

- Mutual Funds
- Direct Equity
- Portfolio Management Services
- Structured Products
- Bonds
- WILL – Will writing services
- LAS - Loan against securities



Our Methodology

We follow a three-step approach

1. Profile Mapping

- Understanding client goals & objectives
- Risk appetite analysis
- Need gap analysis

2. Recommendation & Proposal

- Asset Allocation
- Product recommendations
- Terms of engagement

3. Review & Monitor

- Regular tracking & monitoring updates
- Research recommendations
- Rebalancing suggestions based on changing life priorities



Achievements

- Certificate of Excellence from SBI Mutual fund 2015-16
- Awarded for highest equity sales & SIP sales from NJ Fundz Network 2011-12, 2012-13, 2015-16
- Outstanding performance Award from Reliance Mutual Fund 2011-12
- Outstanding performance Award from HDFC Mutual Fund 2011-12
- Certificate of appreciation from Reliance Mutual fund 2009-10
- Outstanding performance Award from Sundaram Mutual Fund 2009-10



Contact us

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