



A national conference by



# LEARNINGS OF THE DAY

**26<sup>TH</sup> AUGUST 2022**

- The world is looking at India.
- India is less leveraged.
- India's growth will be sustainable. This is what makes us different.
- India is less vulnerable as compared to other economies in the world.
- People want to invest. We need to reach out to them.
- Wealth creation = Sound Investment + Time + Patience
- We should not be complacent. We should strive to do better.
- Short term risk - we need to watch the impact if liquidity dries up worldwide.
- India will do well on the 3 Fs -
  - Farm for the world
  - Front office for the world
  - Factory for the world

***“TAKING INDIA TO THE WORLD”***

by

**Navneet Munot**

MD & CEO,

HDFC Asset Management



- Think of a crisis as an opportunity. Think like an innovator and a challenger.
- Have a 1 year budget, 5 year plan, but 25 year aspiration.
- We at Edelweiss have cultivated a culture that change is 'good'
- Talk to customers. Respect their choice.
- If you take care of customers and employees, regulators and stakeholders will be happy.
- We look at the past, try to learn from it and then plan for the future.
- Work for long-term reward. It is easy to know this difficult to implement.
- Be a constant learner.
- Learn to become comfortable while being uncomfortable.
- Keep one eye on the short term and one eye on the long-term. Have bifocal vision.
- There will be drama in the short term. Dramatic growth in the long-term.
- Try to out-behave than out-analyse.



## ***“GIVING VISION TO MISSION”***

by

**Rashesh Shah**

Chairman,  
Edelweiss Group



# KEY POINTS

- Be passionate about what you do.
- Aspire to become a role model for the world.
- Choose your clients wisely. Learn to say no.
- Be bold.
- One must do philanthropy.



## ***“ASPIRE AND ACHIEVE”***

by  
**Jainy Shah**  
Founder,  
Primestar Investments

- Provide holistic products and services to clients.
- Be client centric.
- Three levels of fee - Basic / Advance / AUM Based
- We charge only on products which requires regular advice.
- Ensure compliance is strong. It will help you scale.
- Your Resume should not talk about you. Your work should.



## ***“ADVISORY AND DISTRIBUTION, CAN BOTH CO-EXIST?”***

by

**Dilshad Billimoria**

MD & Principal Officer

Dilzer Consultants Pvt Ltd

- Be a positive person. Never allow pessimism to hit you in life.
- Never think small. You can achieve big only if you think big.
- If you dare to dream, it is easier to achieve.
- Challenges come with its own opportunities.
- In spite of significant regulatory changes, industry has grown and all stakeholders have grown.
- If you stay focussed and hold your ground, nobody can stop you from growing.
- Spend on IT (Information Technology). If you don't, you will become redundant.
- Keep your team happy.



## ***“DARE TO DREAM”***

by

**Sanjay Shah**

Chairman & MD  
Prudent Corporate Advisory  
Services Ltd.

- Put process before AUM.
- Client retention is very important for growth.
- Spend most of the time facing the client.
- Ensure low single client concentration – AUM wise.
- Set the right Client expectations.



## ***“THE POWER OF PROCESS IN AUM GROWTH”***

by

**Prakash Lohana**

Managing Director  
Ascent Financial Solutions  
Pvt. Ltd.

- The ability to learn defines your growth in life.
- Work not only for money but for good 'Karma' too.
- 3 things are critical- Vision, execution, Spiritual.
- There are no short cuts.
- We are in the business of managing trust.
- We need to have dedication. Sky is the limit.
- We have ocean of opportunity in front of us.
- IQ is important. EQ works better.
- Academics is not everything. Improvisation is equally important.



## ***“WHAT CHAMPIONS DO: AN INSIDE STORY OF NILESH SHAH”***

by

**Nilesh Shah**

Group President and MD

Kotak Mahindra Asset Management



- Content is the king.
- YouTube & Twitter is a better medium than Facebook.
- Complexity doesn't work. Simplicity does.
- Teaching is important to retain your learning.
- Operate in a niche area.
- HNIs want to preserve wealth.
- Fixed Income is an essential part of HNIs portfolio.



## ***“GETTING AND MANAGING HNIS”***

by

**Kirtan Shah**

Founder,

Credence Wealth Advisors

- Luck plays an important part in life but you can't wait for it.
- If you are focused, you can get many things done in less time.
- Outside motivation won't last long. One must stay self motivated.
- The 80/20 Pareto Principal is very powerful. One must learn to apply it.
- Being perfect is good but in most cases, applying the marginal benefit theory works best.
- Enrich the society. If you were helped by someone, help others by paying it forward.



## ***“LIVING THE 'MARGINAL BENEFIT' THEORY”***

by  
**Brijesh Dalmia**  
Founder,  
MasterStroke

- Focus on net sales.
- Look at debt as a category for AUM Building.
- Many MFDs have become complacent. They must strive for scale.
- Don't sell past performance. else you will be easily replaced by Online Platforms.



## ***“THE FUTURE MFD- VER 2.0”***

by

**Amar Shah**

Chief Business Officer,  
ICICI Prudential Asset  
Management Co.

- A bear market is when markets are negative for over 1 year. Anything less than 1 year is a correction.
- Rule of Thumb- A bull market lasts twice as long as a bear market.
- More difficult to call the top than the bottom.
- Lower interest rates increase equity valuations.
- Diversification is necessary.
- Invest in India, today.

## ***“COMING OUT OF A BEAR MARKET SUCCESSFULLY”***



by

**Shankar Sharma**

Founder,

GQuant Investech & First Global

# THANK YOU



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