

Portfolio Review Policy

We are committed to the client portfolio review from time to time and align the same with his needs and objectives, OR as an when there are changes in the situation.

Our Commitment

The portfolio reviews are done in person and online meeting with the clients as per the convenience of clients. The Portfolio review also can be done via email, WhatsApp and personal discussion.

The portfolio reviews are done considering the clients portfolio and its alignment with the client's investment objectives, risk profile and financial circumstances on a periodic basis.

We generally review's the portfolios on half yearly basis with additional reviews as per client requirements, whenever there is a significant change in the client's circumstance's, financial goals, or market conditions.

The portfolios also reviewed, at the time when client wants to do additional investments, or redemptions for his requirements.