

# PBACAPITAL

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## COMPANY PROFILE

360° Wealth Management | Smart X Model Portfolios | Wealth Masterclass

 Wallstreet 24, Warje, Pune - 411058

 [www.pbacapital.in](http://www.pbacapital.in)

 +91-8698714043



## **Engineered For Passive Income & Wealth Creation**

We are a **360° wealth management firm** dedicated to helping individuals build, protect, and grow their wealth with confidence. With 20+ years of market experience, we offer purpose-driven **SmartX Model Portfolios**—designed for passive income and long-term wealth creation—starting from an accessible **₹ 5 lakhs**. Powered by deep research and disciplined strategy, we automate your investments to deliver consistency, efficiency, and unbiased execution.

# Our Service Offerings

## 360° Wealth Management

- Comprehensive goal-based financial planning for all life stages
- Debt restructuring and cash flow optimization for better savings
- Insurance audit & planning to protect your family's future
- Legacy & wealth-building roadmap for long-term prosperity

## SmartX Model Portfolios

- Smart, automated portfolios for every investor
- Access exclusive model portfolios tailored to your goals & risk profile
- Backed by a research team with 20+ years of market experience
- Dedicated Relationship Manager for personalized assistance

## Wealth MasterClass

- Learn to plan and prioritize your investments effectively
- Master the art of budgeting, saving, and wealth creation
- Understand how to build and manage your personal financial roadmap
- Designed for institutes, organizations & working professionals seeking financial literacy

# INVESTMENT PRINCIPLES

## OUR CORE PHILOSOPHY

INVEST WITH INTENT, GROW WITH CONSISTENCY

### Invest in Quality

Buy only fundamentally strong companies with proven performance.

### Value with Safety

Focus on stocks offering value with a sufficient margin of safety.

### Opportunity in Corrections

Treat market downturns as chances to acquire quality stocks at attractive valuations.

### Focused Portfolio

Avoid over-diversification to maintain clarity and control.

### Long-Term Discipline

Invest patiently, while maintaining strict risk management to protect capital.

### Profit Realization

Book profits judiciously whenever and wherever appropriate.

# Why Choose PBA Capital?

We stand out by offering research-backed, automated model portfolios that deliver PMS-level discipline and expertise without the high entry barriers or costly fees. While PMS and big advisory platforms demand ₹50 lakhs or more, our purpose-driven SmartX Model Portfolios start at just ₹5 lakhs – and we charge no PMS or advisory fees, only simple brokerage. With 360° wealth management, transparent execution, and goal-focused strategies for passive income or long-term wealth creation, we make premium investing accessible, efficient, and truly client-first.



**01. Zero Portfolio Management Fees**



**02. Transparent, Client-First Approach**



**03. Tailored for Serious Investors**



**04. Scalable Investment Models**



**05. Proven Track Record**

# OUR STRATEGIC PARTNERSHIP

**SMC GLOBAL SECURITIES LIMITED**

**SEBI Registration number : INZ000199134**

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**\*Strong legacy since 1990s**

**\*QSB (qualified stock broker) listed**

**\*Bank tie ups: SMC offers seamless trading accounts to Banking clients**



# Onboarding Steps



01

## Book your One-on-One session

Schedule your exclusive consultation with our financial experts to kickstart your investment journey



02

## Assess your Goals & Risk Appetite

We will analyze your financial goals, investment requirements & risk tolerance to tailor a perfect plan for you



03

## Choosing your Ideal Portfolio Strategy

Based on our comprehensive assessment, you can select the ideal portfolio strategy that perfectly aligns with your objectives



04

## Open your Demat Account

Our dedicated team will guide you through the simple and quick process of opening your personal demat account with ease



05

## Map Funds & Start Investing

Once your account is set up, simply map your funds and begin your automated and intelligent wealth creation with us



06

## Quarterly Review

We conduct quarterly reviews to evaluate portfolio performance and ensure ongoing alignment with client objectives. During these reviews, we advise on averaging opportunities or lump-sum investments when valuations appear attractive and rebalance portfolios wherever required.

# Meet Our Leadership Team

[www.pbacapital.in](http://www.pbacapital.in)



**ADARSH S N**

**Chief Executive Officer**

With a decade of business experience, Adarsh drives our vision and growth, ensuring our clients receive innovative, results-oriented wealth solutions.



**ASEEM CHAVAN**

**Chief Investment Officer**

Aseem brings 20+ years of market expertise, having held leadership roles at ICICI Securities and Globe Capital. He leads our research-backed investment strategies and SmartX model portfolios.



**SRIRANGA N S**

**Founder, Ex- MD**

The founding force behind our firm, Sriranga's vision and leadership continue to shape our core values and long-term mission.



**ASHWATH RAM**

**Principal Advisor**

Former Global VP of Cummins Inc., Ashwath provides strategic guidance and high-level advisory, leveraging global market experience to strengthen our investment and business decisions.



**Y N PRASAD**

**Chief Operating Officer**

A seasoned operations leader, Prasad has managed 300+ professionals and held senior roles at Cognizant and Infosys, ensuring seamless execution and operational excellence.



## Unlock the future of Intelligent Investing!

Invest smarter. Grow faster.



### Regulatory License Numbers

BSE- AP01047001167816

NSE - CM/FO/CD-AP082567044

MCX- MCX/AP/171941

SEBI (SMC Global Securities Limited) -INZ000199134



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