VAYUNIDHI
CAPITAL SERVICES
PROTECT • SECURE • GROW

VAYUNIDHI CAPITAL SERVICES PRIVATE LIMITED

Rooted in Trust. Focused on Your Financial Future.

Financial choices shaped around what matters to you.

A PERSONAL APPROACH

At Vayunidhi Capital Services Private Limited, we bring your investments, protection and financial priorities into one conversation. With personal attention and clear explanations, we help you consider available choices, understand what matters and take informed next steps—whether you are starting out, supporting a family or planning for the future.

Mutual Funds • Insurance • Demat • Bonds • Financial Solutions

WHO WE ARE

Before we discuss solutions, we listen.

Your financial decisions reflect the people you care for, the commitments you carry and the future you want to build. We begin by understanding those priorities, then help you make sense of the choices available.

OUR APPROACH

What personal attention means

01

Your priorities lead

Your goals and comfort with risk help shape what we discuss.

02

Know what you are choosing

Know the features, costs, risks and limitations before deciding.

03

A relationship that continues

Stay connected for service needs as your priorities change.

Solutions for what matters to you.

Build for the future. Protect your family. Bring your commitments into focus.

Investments

Give your goals a financial starting point.

Explore mutual funds, gold, REITs, bonds and demat services in light of your goals and risk preferences. Research calls and market insights may be available through authorised partners. See the next page for global and specialist investments.

Insurance

Plan for the responsibilities that cannot wait.

Consider protection for your life, health and financial commitments. Look closely at coverage, premiums, exclusions and policy terms before choosing.

Financial Planning

See how your financial decisions fit together.

Bring your goals, investments and commitments into one discussion. Identify your priorities and the practical steps to consider as your needs evolve.

Debt Management

Bring your borrowing into the bigger picture.

Review your loans, repayment commitments and borrowing priorities alongside your other financial goals. Identify the areas that need attention.

Tax Planning

Make tax part of the conversation.

Discuss relevant tax considerations alongside investment and protection choices, with specialist advice where required.

Broader opportunities. A considered approach.

More investment choices call for a closer look at suitability. For clients considering international exposure or specialist strategies, the conversation begins with objectives, investment commitments, liquidity needs and risk.

SPECIALIST INVESTMENTS
SIFs • PMS • AIFs | ELIGIBLE INVESTORS

GLOBAL MARKETS



Global Investments

Consider international exposure.

Consider available routes to international markets, with attention to currency movements, market risks, costs and applicable requirements.

SIF



Specialized Investment Funds

Understand the strategy.

Understand how specialised fund strategies operate, including their risks, costs and investor eligibility requirements.

PMS



Portfolio Management Services

Review the mandate.

Review the portfolio manager's approach, mandate, fees and reporting before considering an available service.

AIF



Alternative Investment Funds

Examine the commitments.

Consider fund strategy, investment commitments, liquidity terms and associated risks before making a decision.

Begin with suitability. Then consider the opportunity.

Availability is subject to provider arrangements, investor eligibility and applicable regulations. Minimum investment requirements, liquidity restrictions and product-specific risks may apply.

From your first question to your next step.

A personal process that keeps each decision easy to understand.

01

Share your priorities

Tell us your goals, commitments and the questions on your mind.

02

Consider the choices

Discuss relevant options, including features, costs, risks and limitations.

03

Put decisions into action

Receive help with documentation, onboarding and transactions.

04

Stay Connected

Contact our team for service needs as your priorities evolve.

You do not need every answer to begin. Start with a question.

OUR REACH

Personal attention. An established client community.

350+

CLIENTS

₹25+ crore

ASSETS SERVICED

5

Areas of financial support

Investments • Insurance • Financial Planning
Debt Management • Tax Planning

YOUR PRIORITIES, CONSIDERED TOGETHER

Investments, protection, planning, borrowing and tax considerations are connected. Bringing them into one conversation helps you see your priorities more clearly.

Business-scale figures; not investment-performance measures.

More choice. A familiar point of contact.

Explore available products and services across providers, with our team helping you understand the choices and coordinate the next steps.

Invest with purpose

MUTUAL FUND HOUSES

SBI MUTUAL FUND — A PARTNER FOR LIFE
HDFC MUTUAL FUND
ICICI PRUDENTIAL MUTUAL FUND — TARAKKI KAREIN!
Nippon India Mutual Fund — Wealth sets you free
kotak Mutual Fund
MUTUAL FUND
motilal oswal — think wealth creation
PPFAS — There's only one right way®

Protect what matters

INSURANCE PROVIDERS

AXIS MAX LIFE INSURANCE
HDFC ERGO GENERAL INSURANCE — Har pal aapke saath
ICICI Lombard
niva Bupa Health Insurance
TATA AIG INSURANCE

Invest with ease

INVESTMENT PLATFORM

ASSETPLUS — PARTNER. GROW. SUCCEED.

Access the markets

DEMAT & BROKING

kotak neo

Bonds & fixed income

Government securities • Corporate bonds

Logos belong to their respective owners. Product availability is subject to provider arrangements.

CONNECT WITH US

What would you like your money to help you do?

Start investing, review your protection or discuss a financial priority. Speak with Karthik in Bengaluru or Suthirtha in Kalaburagi.

Start with one priority. Let’s talk.

BENGALURU

Karthik T

+91 99160 31106

karthik@vayunidhi.com

KK Wealth, 3rd Floor, 16/1A, DMS Square, Tumkur Road, opposite Dasarahalli Metro Station, Bengaluru, Karnataka - 560057

SCAN FOR DIRECTIONS

Bengaluru location

KALABURAGI

Suthirtha Patil

+91 91483 96391

support@vayunidhi.com

KK Complex, 3, Sedam Road
Opposite Old RTO
Visvesvaraya Nagar, Tilak Nagar
Kusnoor, Kalaburagi (Gulbarga)
Karnataka - 585105

SCAN FOR DIRECTIONS

Kalaburagi location

www.vayunidhi.com

REGISTRATION DETAILS

AMFI REGISTRATION	GSTIN	TAN
ARN-366141	29AAMCV2441D1ZA	BLRV34791B