



*It's not about the  
destination or the  
journey*

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It's about the  
**COMPANY**  
you choose in this journey

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**Pentagraph**   
YOUR INVESTMENT PARTNERS



## From the Chairman's Desk



**RAHUL MONE**  
CHAIRMAN

On behalf of Pentagraph, we welcome you to our *Wealth & Financial Planning Boutique*.

We recognise that a great relationship is founded on the solid grounds of trust. And to start building such an important asset as trust, it is important to first understand the company that you are going to have in your life-long journey.

First, we are going to walk you through the core philosophy which acts as our compass, and guides us in every decision that we take, on behalf of our clients and for us.

Next, we will be taking a right turn to understand our services and the value that it would create for you.

We are confident that you would find this walk-through helpful and promising so that we all can take our first step towards a long-lasting relationship. We value your time and therefore, we have kept this brochure intentionally simple and to the point. But, we are always available to take you through our detailed services presentation in person.

Thank you!



# Invest in Life

No one else can do it for you

For everything else, there's

# Pentagraph



# Welcome to Pentagraph

The name **Pentagraph** is inspired from a mechanical instrument **PANTOGRAPH**

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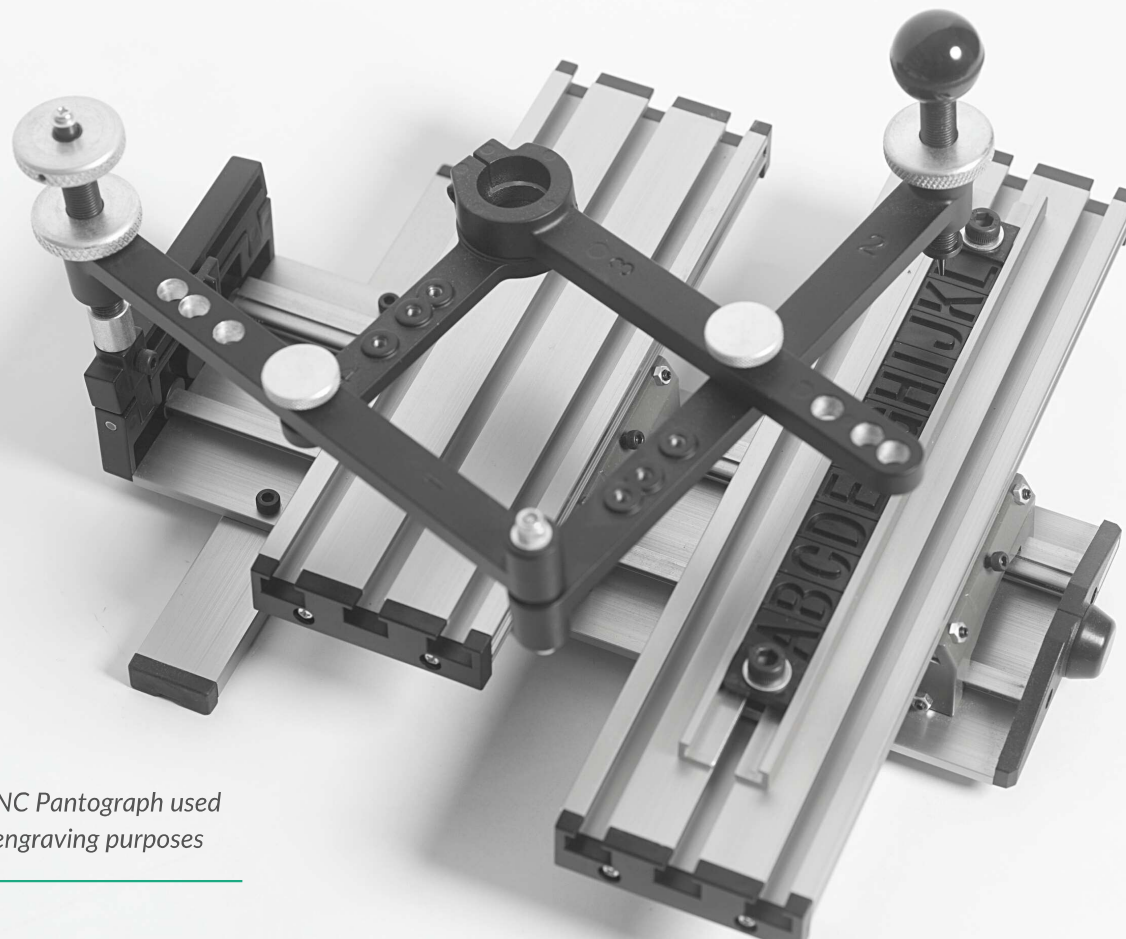
*In a Pantograph, a small image created using its one arm (a) causes a movement of its other arm (b) creating a similar larger image on the other side.*

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**Pentagraph is a metaphor for** being instrumental in creating a larger impact for you, by implementing simple, scientific yet sophisticated principles of Finance, Wealth & Life.

*A CNC Pantograph used for engraving purposes*

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## INVEST in LIFE, No one else can do it for you

*"If you spend most of your time in creating,  
protecting and managing your wealth & finances,  
when would you live your life the way you want to"*

FOUNDED IN 2009, Pentagraph makes  
**PEACE, HAPPINESS & ABUNDANCE**  
*available to you*

We invest our expertise and diligence in **creating, protecting** and helping you **distribute** your **wealth** so that you can lead the life the way you truly deserve.

Our HNI and Institutional clients recognise us for our **unbiased** advice towards helping them accomplish their financial goals.

We understand that despite having a great cash flow, today's professionals, need **crisis-agnostic financial planning**, now than ever before. We handhold you through omnipresent volatility by creating a **sustainable** financial plan.

Our sole purpose is to transform  
the quality of your financial life

# Customer-Centric Pentasophy



## PASSION

We push ourselves to go beyond the obvious and add value to you



## PHILOSOPHY

We simplify finances, balance emotions during highs & lows, maintain rationality and help you win



## PROCESS

We have a structured approach which helps us to simplify a lot of complex things



## PRIVACY

We value the confidentiality of your data, and have stringent user controls and highly secure system



## PEACE

Managing your finances is what we do, but ensuring your peace of mind is our larger goal.

# Wealth Quadrant

*Let your money do all the hard-work*

**ACTIVE**  
WEALTH: 5%



EMPLOYEE

**PASSIVE**  
WEALTH: 95%



BUSINESS OWNER

## ACTIVE INCOME

The income that you generate depending on the amount of time you work.



SELF-EMPLOYED

POPULATION: 95%



INVESTOR

POPULATION: 5%

## PASSIVE INCOME

The income generated by your investment in the market or people or the systems. Money creates money.

Wealth Quadrant credit: Robert T Kiyosaki

*Pentagraph analyses your **critical financial health ratios** to explore ways to help you move towards the **right side** of the wealth quadrant.*

# MISSION

To provide efficient  
& effective investment  
advice and services

# VISION

To create a positive  
impact on client's  
financial life



# BUSINESS VERTICALS

A BOUTIQUE OF PERSONALIZED SOLUTIONS

**01 WEALTH ADMINISTRATION**  
Wealth Protection, Wealth Management, Wealth Distribution

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**02 FINANCIAL PLANNING**  
From Cashflow to Financial Freedom

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**03 FINANCIAL HEALTH CHECKUP**  
Identify key parameters that influence your current financial life

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## WEALTH ADMINISTRATION

Worrying about financial freedom that you have achieved is not freedom at all. All you need is a partner you can put your **trust** in and know that your wealth is in safe hands, and **your freedom is undisturbed**.

### Pentagraph Wealth Administration

- **Wealth Protection**  
We safe-guard your wealth through risk management, compliances, insurance, taxation and more

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- **Wealth Management**  
We make money work for you through important investment decision-support, strategies that ensure growth reliability, by being one-touch-point for all your needs (Global Investment, PMS, AIF, PE, etc.)

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- **Wealth Distribution**  
We ensure that your wealth is distributed across areas that truly retain your ongoing legacy, assuring sustainable growth and creating value for you, your near ones and society at large through legacy planning, philanthropy, and more



The real value of life is TIME;  
Spend it on people who matter the MOST

## FINANCIAL PLANNING

*It's not about securing the future,  
but about designing your present*

The words 'Financial Planning' often relate to future, goal and the likes. But financial planning is really about financial commitment, not just the advice, but the action & execution.

FINANCIAL PLANNING IS NOT ABOUT  
Products, calculations and returns

IT'S ABOUT YOU, YOUR PEACE &  
HAPPINESS

There's nothing called as '*lots of Money*'.  
Financial planning helps you to identify how  
much money you need, and ensure its  
availability when you need it.

## YOUR FINANCIAL COACH

With a simple and well-defined process, we guide you to achieve that milestone as a financial coach and walk with you throughout this journey.

And therefore,

“ IT'S SO IMPORTANT TO CHOOSE THE  
RIGHT COMPANY IN THIS JOURNEY ”

### PROCESS FLOW



# FINANCIAL HEALTH CHECKUP

The first baby-step towards achieving financial freedom

Even before we start our journey, we need to know where we stand.


## Key Parameters Analysis

INCOME | EXPENSES | SAVINGS | ASSETS | LIABILITIES | RISKS | NET WORTH and more

## Comprehensive Report

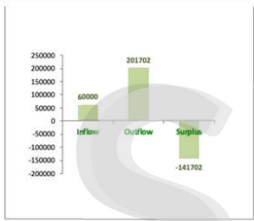
Our financial-life experts study the key financial parameters and create a detailed report on your overall financial health and recommend methods to make it fit.

## FINANCIAL HEALTH CHECKUP - A snapshot of Sample Report

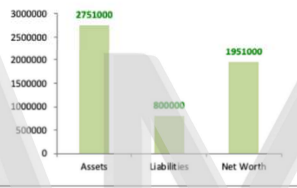


**Mr & Mrs Oberoi**  
on Financial Health Checkup  
Date: xx.xx.xxxx

### Current Cashflow Distribution



### Net Worth Statement




### Critical Financial Ratios

Financial Ratio Category	Ratio	Benchmark
Basic Liquidity Ratio	23.2	3.0 - 6.0
Life Insurance Coverage Ratio	4.0	MIN 1.0
Expense Ratio	0.0	< 0.5
Debt Servicing Ratio	1.98	< 0.4

[MORE >](#)

### Actual Asset Allocation



● Debt : 40.01%  
● Equity : 58.26%  
● Gold : 1.74%

[HEALTH PARAMETERS >](#)

[MORE OBSERVATIONS & SUGGESTIONS >](#)

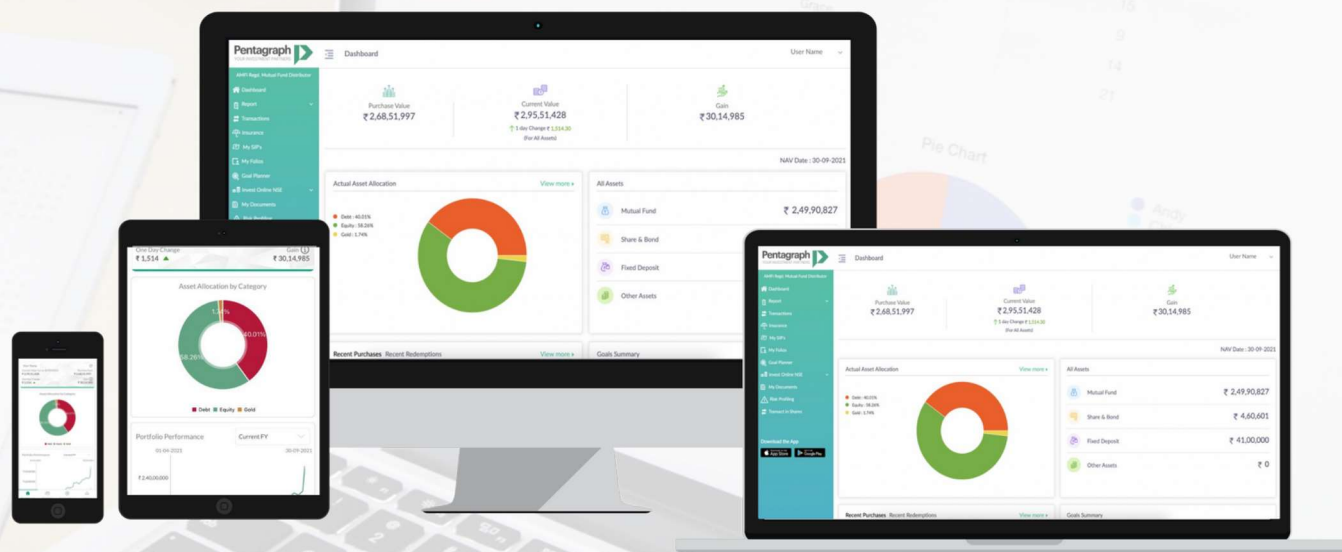
OBSERVATIONS	CORRECTIVE ACTIONS SUGGESTIONS
Goals haven't been identified	You haven't identified your goals, so it is suggested that you should start thinking about your goals and other requirements so to plan it in a better manner. In the process take help of time line and check for amount required considering inflation.

*Disclaimer: The names and numbers used in this snapshot are dummy, and do not capture the actual details of any of our clients.*



# THE Pentagraph DASHBOARD

YOUR INVESTMENT *digital* PARTNER



Highly secure multi-platform Pentagraph dashboard



Intuitive Interface, investment tracking, generating reports



Advanced technology with graphical reports for better comprehension



# TEAM PENTASTIC

IN OUR TEAM WE TRUST



**RAHUL MONE**  
*Chairman*



**MEGHASHYAM SINKAR**  
*Co-founder*



**ANIL KUMAR BHARTI**  
*Co-founder*



**YOGESH KSHIRSAGAR**  
*Senior Director*



**YOGESH MEHTA**  
*Senior Director*



**NIMISHA**  
*Director*



**ASHISH JOSHI**  
*Director*



**PUSHKAR DONGRE**  
*Director*



**RIDDHI SEN**  
*Director*



**ASIT KUMAR**  
*Associate Director*



**KAMLESH SAO**  
*Associate Director*



**VIREN BARTAKKE**  
*Consultant*



**PRACHI PANSE**  
*Consultant*



**SAHIL KANADE**  
*Consultant*



**MINAL KAUR GARCHA**  
*Client Service Manager*



**NIRALI KALE**  
*Client Service Manager*



**POONAM KHAIRNAR**  
*Client Service Manager*



**NAMRATA KULKARNI**  
*Client Service Manager*



**HARSH SHINDE**  
*Administration Co-ordinator*



**RAHUL GAWAI**  
*Administration Co-ordinator*



# Thank you

We would love to connect with you...



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+91 74100 97093



## Website

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## Email Address

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