

MUTUAL FUND DISTRIBUTORS IN MUMBAI

INDIA

# FINANCE OUTLOOK

GATEWAY TO FINANCIAL EMPOWERMENT

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## FINANCE OUTLOOK

RECOGNIZES

AMS INVESTMENTS

AS ONE OF THE

10 MOST PROMISING MUTUAL FUND  
DISTRIBUTORS IN MUMBAI - 2024

Through this certification, Finance Outlook India extends its recognition, gratitude, and admiration to the company's unparalleled expertise as a mutual fund distributor in Mumbai.



**SAMRAT PRADHAN**  
Managing Editor



# AMS INVESTMENTS

## Empowering Investors by Simplifying Complex Investment Concepts



Mahesh Bhagwat  
 Founder & Partner

Over the past decade, India's mutual fund industry has registered a sixfold growth, demonstrating its resilience and the impact of the myriad of strategic reforms and SEBI-led regulatory changes that have been implemented. Tightening guidelines on transparency, fair practices, and investor protection have nurtured an environment that is more streamlined and trusted by investors, leading to the sector's boom. Beyond these factors, mutual fund distributors and technology have played a critical role in advancing the sector's reach, simplifying access and participation in the industry by retail investors.

Nevertheless, while the Indian ecosystem is geared towards boosting investor awareness, there remains a lack of knowledge which leads several investors to be attracted towards short-term gains, overlooking the advantages of long-term disciplined investing. This creates a struggle for clients to find

the balance between short-term financial needs and long-term wealth-creation objectives. Bridging this gap by emphasizing the importance of a patient, long-term investment approach, AMS Investments, a Mumbai-based Mutual Fund Distribution firm, strives to educate and support clients in benefiting from the power of compounding.

### Promoting Long-Term Investments

Where the majority of clients incline towards short-term gains from investments, including mutual funds, AMS Investments, the brainchild of two industry veterans Mahesh Bhagwat and Samir Gilani, boasting over fifty years of experience in the domain, advocates for long-term investment and holding of high-quality mutual fund schemes, typically for 10+ years, allowing time for the funds to fully realize their potential.

An AMFI registered mutual fund distributor, AMS Investments boasts a stellar background, and currently oversees a substantial portfolio, for over 100+ clients in India and abroad, with an exceptional client retention rate of 98 percent. The firm in collaboration with Prudent Corporate Advisory Services, which amplifies its position in the sector, ensuring effortless execution and accountability. Prominent for its transparency and deep market expertise, the company caters to the needs of a diverse range of clients, assisting them in navigating varied market cycles and economic conditions with ease.

"What truly sets us apart is the vast experience that both partners bring to the table. Having worked in the finance industry for decades, we have developed an in-depth understanding of market dynamics and investment nuances. We also believe in being open about our own journey, including the mistakes we made early in our careers. This transparency helps our clients avoid common pitfalls and strengthens our relationship with them. It is this personalized, consultative approach that has earned AMS a loyal



Samir Amin Gilani  
 Partner

client base and made us a trusted advisor in the financial community", shares Mahesh Bhagwat, Founder & Partner, AMS Investments.

Apart from the transparency and trust it fosters, the company also stands out for the personal stake that the founding partners have in the business. Not only leading the firm, Mahesh and Samir actively advise clients on mutual fund investments, and also invest their own wealth in the same mutual funds. Aligning their own interests with that of the clients, the duo demonstrate exceptional confidence in the recommended products, boosting client confidence as well.

### Simplifying Finance and Investing

Apart from the core advisory services, the company also carried out a range of investor awareness initiatives, such as consistently developing educational content which helps clients in understanding the beneficial principles of long-term and disciplined investing in mutual funds. The company's YouTube channel, named 'The Mutual Fund Guys', acts as the perfect platform for encouraging greater and more informed investments in the market, breaking complex concepts and principles into short 4-5 minute explainer videos that simplify finance and make it more engaging.

"Our approach at AMS Investments has always been to simplify the investment process for our clients. We

believe that investing in mutual funds should not be overly complicated but rather grounded in empirical data and sound financial principles. To this end, we conduct thorough research on various aspects of mutual fund performance, including historical returns, fund pedigree, and fund manager expertise, providing our clients with a clear, objective view of the investment landscape. Our goal is to remove the guesswork from investing and give our clients the tools they need to make informed decisions", shares Samir Gilani, Partner, AMS Investments.

Dedicated to ensuring that its clients fully comprehend the rationale behind the recommended investments, the company focuses on education and transparency, which is achieved through personalized consultations. Going one step ahead, the company leverages its partnership with Prudent Corporate Advisory to benefit from their comprehensive technology platform. This enables the firm to effectively handle client portfolios, offering a seamless and streamlined experience from the very start.



*What truly sets us apart is the vast experience that both partners bring to the table*

Not only does the firm, but the clients also benefit from the user-friendly platform, which enables them to analyze investments, access account statements, and retrieve tax calculations for any financial year. Providing real-time insights and information, this platform has been designed to align with the evolving client needs with agility, ensuring clients are empowered to make informed investment choices at all times.

Having carved a unique position for itself in the investments industry, AMS Investments is on the mission to empower modern investors with the power of knowledge and disciplined investing, in the process, becoming the globally preferred mutual fund distribution firm. **FOI**