

● FINANCIAL PLANNING & INVESTING ADVISORY · BHOPAL, INDIA

Elevate your wealth, *plan for tomorrow.*

Tailored strategies to stay ahead in your financial journey. A written plan, a portfolio built to match, and a team that stays with you as life and markets change.

Investment planning

Portfolio building

Retirement

Tax & risk



800+

Financial freedom milestones



100%

Personalised, never generic



250+

Portfolios built



WHO WE ARE

Shape your financial future with *confidence*.

Growcrest One is a Bhopal-based financial planning advisory founded by two brothers, a capital-markets researcher and a data scientist. We build personalised plans for professionals and business owners across India, never a generic product pitch.

250+

Portfolios built and restructured

7+

Years of equity market experience

800+

Financial freedom milestones

WHAT WE HELP YOU REALISE AND FINE-TUNE

01

Your approach

A written roadmap for savings, investments, protection and tax, built around your goals and risk tolerance.

02

Your perspective

Education built in: courses, communities, videos and articles so you understand every decision.

03

Your confidence

Regular reviews keep the plan on track as markets and your life change, so you always know the next step.

What our clients *say.*

Marketing professionals, artists, founders and film-makers from Delhi to Bengaluru. Real plans, real outcomes.

“

Growcrest One transformed the way I approach my finances. Their Investment Planning service was a game changer, introducing me to asset classes I didn't even know existed.



Riza

Marketing professional, Delhi

“

With effective planning and a tailor-made strategy from the team, I managed to bid goodbye to my corporate job. No generic products, just a plan that fit me perfectly.



Harshita

Artist, Mumbai

“

As a business owner I was overwhelmed managing my finances. Growcrest One helped me secure my business future and set me on a path to personal financial freedom.



Ujjwal

Entrepreneur, Bhopal

“

Because of a conservative mindset I stayed away from Indian equity markets. Can't thank Growcrest One enough for clearing all my doubts and helping me start my investing journey.



Surbhit

Creative director, Mumbai

“

Managing my investments felt like navigating a storm. Their deep understanding of the Indian market helped me chart a clean plan of action, and I have seen remarkable growth.



Jaideep

Film-maker, Mumbai

“

I finally feel confident and in control of my financial future. I have a clear roadmap to my goals and know exactly what steps to take.



Piyali

Designer, Bengaluru

Financial freedom in *four* steps.

Financial planning can feel overwhelming. We simplify the process, so financial success is accessible to everyone. Start immediately with step 1: a free consultation.



1

Initial discovery meeting

Understanding your dreams and goals

We assess your finances and aspirations: income, assets, liabilities, protection and what you want money to do for you.

2

Strategic financial plan

Crafting a personalised roadmap

A written roadmap with savings targets, investment choices and timelines for each goal.

3

Implementation & execution

Turning strategy into action

We optimise your existing portfolio and start the new investments with you, step by step.

4

Monitoring & adjusting

Staying on track

Regular reviews update the plan for market conditions and life changes, so you seize opportunities early.

[Book a free consultation](#)

growcrestone.com/free-consultation · +91 86400 41496

Eight services. *One plan* built around you.

08



01

Investment Planning

Maximising returns through informed decisions.



02

Portfolio Building & Restructuring

Optimise for growth and stability.



03

Retirement Planning

Secure your future with sustainable strategies.



04

Dynamic Asset Allocation

Adaptive strategies for optimal balance.



05

Risk Management

Safeguarding your financial future.



06

Equity & Debt Management

Balanced growth for lasting wealth.



07

Tax Planning

Strategic tax solutions for lasting benefits.



08

Spending Advisory

Spend every rupee in the best possible manner.



01

Investment Planning

Maximising returns through informed decisions

Tailoring investment strategies to match your financial goals and risk tolerance. The art of making your money work harder than you do.

Think of a road trip. You map the best route (strategy), pack the essentials (diversification) and make sure the car can handle bumps (volatility), so you reach your destination safely.

- ✓ Diversify investment portfolio
- ✓ Secure financial future
- ✓ Navigate market volatility
- ✓ Goal-based, risk-matched plan



02

Portfolio Building & Restructuring

Dynamic management for peak performance

Constructing and continuously optimising a portfolio to reflect changes in your life stages and market conditions.

Like gardening: you plant different seeds, then water, prune and rearrange them so the garden flourishes in every season.

- ✓ Align investments with objectives
- ✓ Enhance portfolio resilience
- ✓ Balance risk against performance
- ✓ Review at every life stage



03

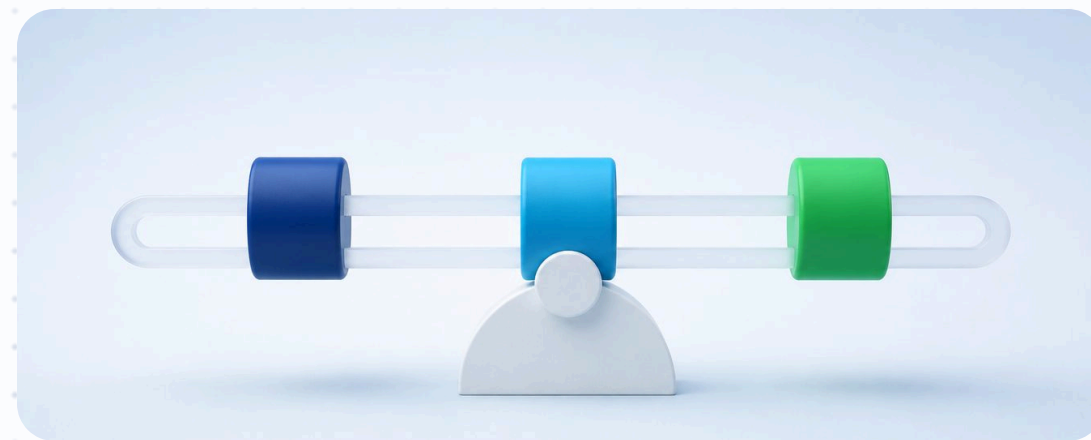
Retirement Planning

Securing your future with sustainable strategies

Comprehensive retirement solutions for a comfortable and secure future. The master plan for living your best life later.

Consider building a nest: gather the twigs (estimate needs), line it with soft materials (steady income) and make it strong enough for all weather (longevity and inflation).

- ✓ Estimate future financial needs
- ✓ Create steady income streams
- ✓ Plan for longevity and inflation
- ✓ Protect the plan from surprises



04

Dynamic Asset Allocation

Agility in asset management

Adapting asset allocation to market conditions and your evolving financial situation for optimal balance. Financial yoga for your portfolio.

Picture cooking a gourmet meal: you keep tasting and adjusting the seasoning so the dish stays balanced as the recipe changes.

- ✓ Maximise returns through allocation
- ✓ Reduce risk with strategic shifts
- ✓ Respond proactively to trends
- ✓ Keep the mix fit for your stage



05

Risk Management

Minimising uncertainties in your financial journey

Identify, assess and mitigate financial risks tailored to your unique profile. The bubble wrap that keeps your money safe from what life throws at you.

Like wearing a helmet on a bike. You might never fall, but if you do, you're protected.

- ✓ Protect against market volatility
- ✓ Safeguard assets through diversification
- ✓ Prepare for unexpected events
- ✓ Right-size insurance cover



06

Equity & Debt Management

Balancing growth and stability

Optimising the mix of equity and debt for a balanced approach to wealth building and preservation. The tightrope walk between what you own and what you owe.

Think of baking a cake: the right mix of ingredients gives the perfect balance of taste and texture.

- ✓ Tailor debt levels to risk tolerance
- ✓ Leverage equity for growth
- ✓ Manage interest-rate and credit risk
- ✓ Clear costly debt first



07

Tax Planning

Efficient strategies for maximising wealth

Tax-efficient investment strategies to reduce liabilities and maximise after-tax income. The legal way to keep more of your hard-earned cash.

Like pruning a tree: trim away unnecessary branches (tax liabilities) so the tree (your wealth) grows stronger.

- ✓ Utilise tax-advantaged instruments
- ✓ Capitalise on credits and deductions
- ✓ Strategise for income and estate taxes
- ✓ Plan the year, not just March



08

Spending Advisory Services

Spend every rupee in the best possible manner

Insights and tailor-made strategies to spend your hard-earned money in the most fulfilling and rewarding manner. For when your splurges should be smart, not silly.

A shopping assistant for your finances: we help you choose the best buys, spot the deals and keep the spree financially sound.

- ✓ Better spending decisions
- ✓ Budgeting for big purchases
- ✓ Identify cost-effective opportunities
- ✓ Sustainable spending patterns

Meet the directors driving your *success*.



Asim Mateen

Co-director · Capital markets & research

A multi-faceted individual whose passion for the capital markets is matched only by his enthusiasm for photography and travel. With 7+ years in the equity market and experience at several fintech companies, Asim has developed an impeccable skill for research analysis, navigating stocks, bonds and investments with precision.



Amir Mateen

Co-director · Data & analytics

A rare breed: a sharp-eyed investor, an analytical data scientist and an insatiable technology enthusiast, who loves his chai and travelling. His love of data and analytics comes in handy when it comes to finding undervalued companies and multibaggers, and spotting game-changing opportunities early.

01

Progressive path

Forward-thinking strategies driven by market anticipation and adaptability.

02

Growth goals

Ambitious objectives for holistic financial well-being, planned meticulously.

03

Plans, not products

Every recommendation starts from your situation, never a generic product.

● CONNECT WITH US

Ready to turn *dreams* into reality?

WEBSITE

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Disclaimer: We are not SEBI registered. Growcrest One provides financial planning, education and advisory support. Investments are subject to market risk. Please read all scheme-related documents carefully before investing. Past performance is not a guarantee of future results.