Imperial Value Services: Your One-Stop Financial Solution

In the dynamic world of finance, Imperial Value Services Pvt. Ltd. stands as a beacon of trust and innovation. Headquartered in prestigious Nariman Point, Mumbai, with a presence in the United States, we manage over $1 billion in assets under advisory and serve more than 5,000 families globally.

We are more than just a financial institution—we are your partner in building a secure and prosperous future. Our comprehensive approach combines cutting-edge technology with personalized service to address all your financial needs under one roof.

A Legacy of Trust and Excellence: Satish Pandey

At the helm of the advisory is **Mr. Satish Pandey**, a seasoned finance professional with **more than 20 years of experience** spanning **Investment banking , Debt Placement and Financial Services including Product Distribution (Mutual funds, AIF, PMS, VC Fund and other Fixed Income Instrument).**

Under Mr. Pandey's leadership, the firm currently boasts **Assets Under Advisory (AUA) exceeding ₹7,500 Crores,** serving a robust and growing **network of over 5,000 HNI's** and individual clients worldwide. His role has been instrumental in driving the firm's expansion in terms of client reach.

Educational Background

Mr. Pandey's academic credentials further strengthen his professional acumen. He holds an **Executive MBA(Finance)** from **IIT Patna**, **Master of Marketing Management** from Pondicherry University, **Post Graduate Diploma in Financial Markets and Portfolio Management** from Lucknow University and an **Executive Program in Business Management** (EPBM) from **IIM Calcutta**

Cutting-Edge Technology Platform

Digital Client Onboarding

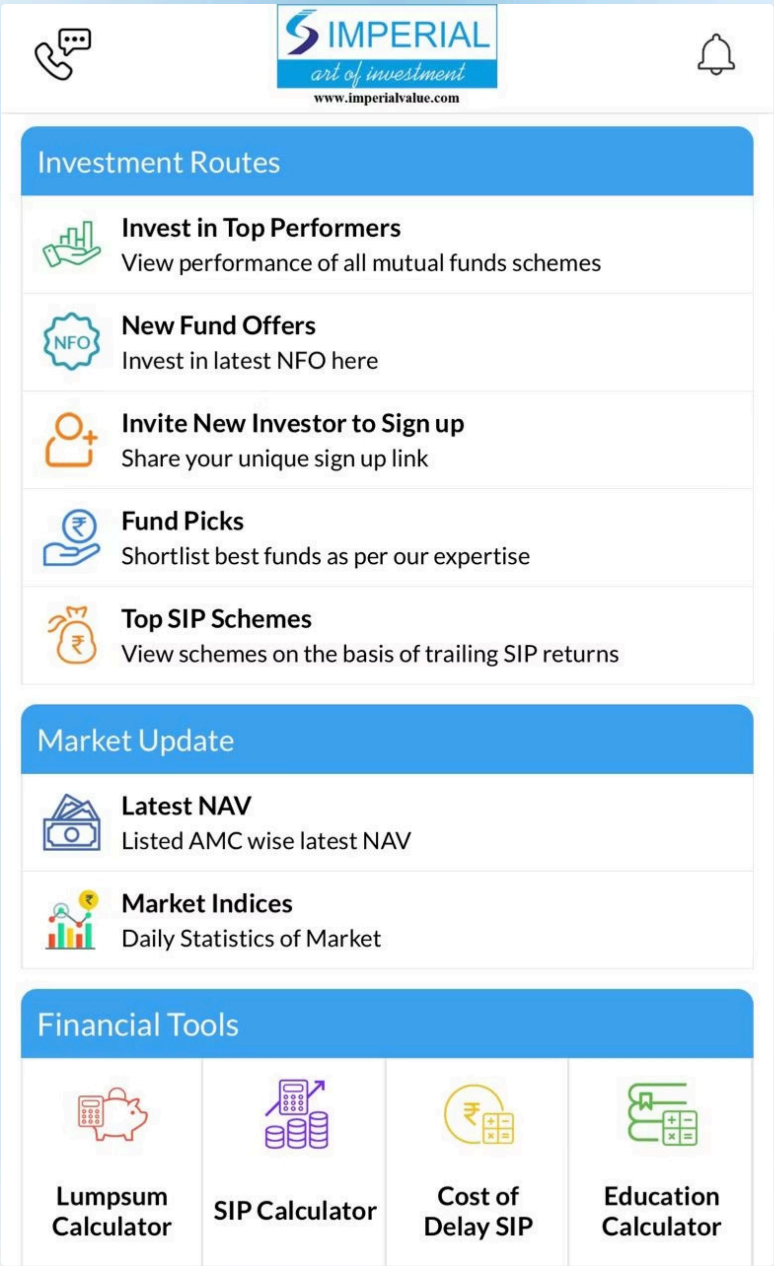
Our streamlined process eliminates cumbersome paperwork, enabling clients to start their financial journey effortlessly and quickly.

Real-Time Portfolio Tracking

Access comprehensive portfolio analysis tools that provide instant insights into your investments, helping you stay informed about your financial position.

Goal-Based Financial Planning

Utilize our advanced calculators and personalized portfolio updates to make informed decisions with ease, all while enjoying a hassle-free experience.



Comprehensive Product Offerings

Wealth Creation

Mutual Funds, Portfolio Management Services, Alternative Investment Funds, Unlisted Equities, Structured Products

Protection Solutions

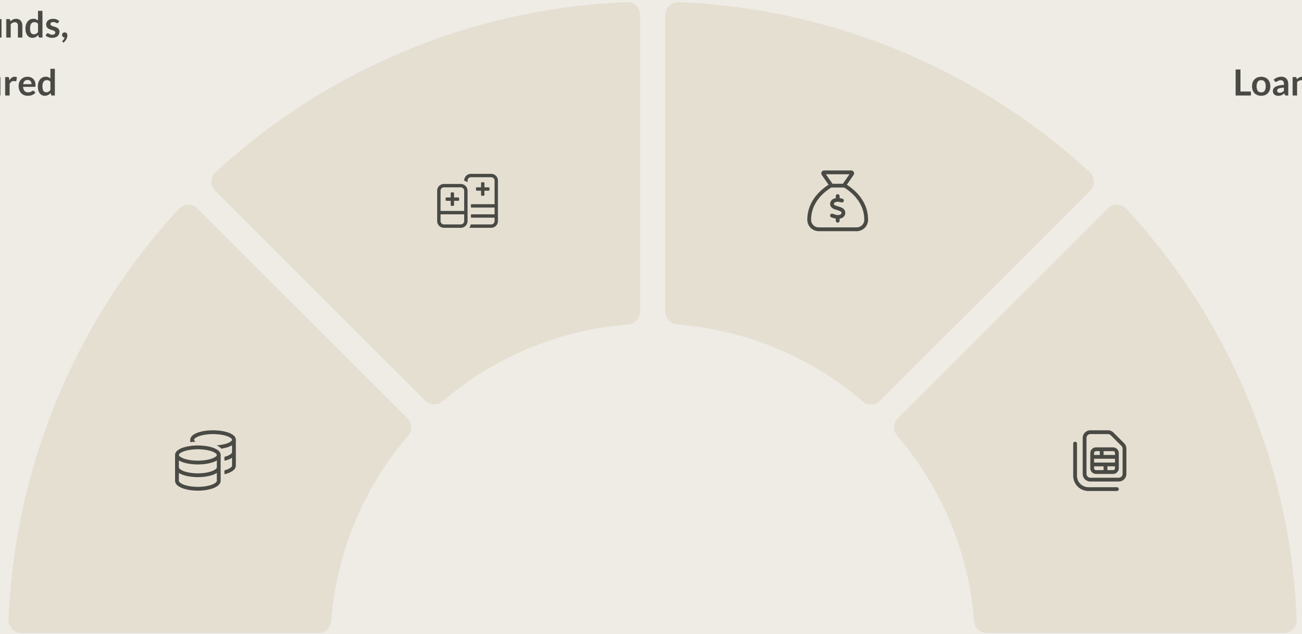
Life and General Insurance

Investment Products

Corporate Fixed Deposits, Government Bonds, Non Convertible Debentures

Financial Services

Loans, Loan Against Securities, IEPF Recovery



The Imperial Wealth App

Multi-Product Transaction Platform

Seamlessly transact in Mutual Funds, Fixed Deposits, Bonds, Stocks, P2P investments, Smallcase, NPS, and LAS with just a few taps.

Single Family Login

Conveniently manage portfolios for individuals, minors, HUFs, NRIs, and corporates under one unified login, simplifying family wealth management.

Advanced Features

Access mutual fund factsheets, goal-based calculators, updated portfolio valuations, and trigger-based transactions for strategic investing.

Technology-Driven Investment Excellence

Chicago-based Analytical Software Morningstar

Advanced platform providing comprehensive analysis, systematic rebalancing, and strategic diversification capabilities

Fundamental & Technical Analysis

Rigorous evaluation tools for identifying optimal investment opportunities through multiple analytical lenses

Data Integration

Seamless integration of historical data, market research, and forward-looking assumptions for structured investment insights

Evidence-Based Decisions

All recommendations backed by empirical research, past performance data, and time-tested methodologies

Finalyca Analytics

Robust framework for in-depth comparison studies and benchmark analysis against market standards

Stock Intersection Analysis

Advanced screening tools to identify stocks that meet multiple criteria and quality parameters

Reliability Metrics

Comprehensive assessment tools ensuring investment recommendations meet stringent reliability standards

User-Friendly Reporting

Complex market data transformed into clear, understandable insights for client comprehension

Comprehensive Research Ecosystem

Integrated technology stack that combines multiple analytical tools for holistic investment decision-making

Systematic Approach

Technology-enabled processes ensure consistency and precision in portfolio construction and management

Our Foundation of Excellence

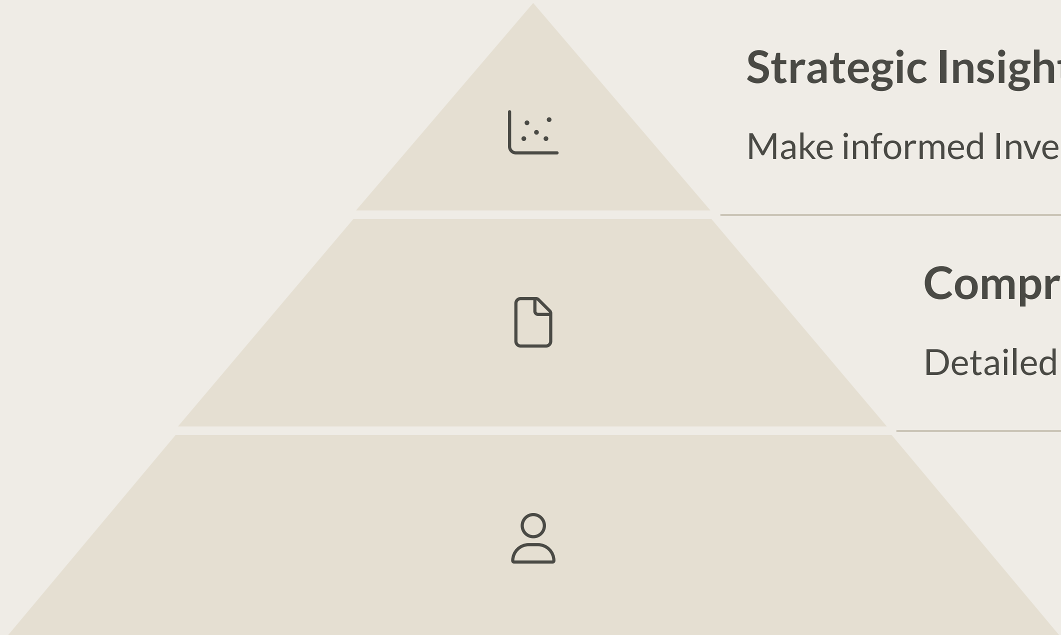
Our Experienced Team

With over two decades of proven success in the financial services industry, our organization is powered by a dedicated team of approximately 50 highly qualified finance professionals. Our diverse expertise spans Chartered Accountants, MBA graduates, and seasoned industry veterans who bring deep domain knowledge across operations, sales, and client services.

Our Distinguished Track Record

This carefully assembled team of specialists has been instrumental in building our distinguished track record, combining technical excellence with practical market insights to consistently deliver superior results for our clients. Our commitment to maintaining the highest professional standards, backed by decades of collective experience, positions us as a trusted partner in navigating today's complex financial landscape.

Robust Business Analytical Tools



Strategic Insights

Make informed Investment Decisions

Comprehensive Reports

Detailed Portfolio and MIS analysis

Client Categorization

Segment based on Business Volume

Our suite of Business Analytical Tools provides unparalleled insights into investment portfolios. Client Categorization Reports segment clients based on business volume, while Portfolio Analysis Reports monitor asset allocation across debt, equity, and sub-categories in a single, easy-to-read file.

Our comprehensive MIS Reports track client-level activities on a monthly or yearly basis, covering SIPs, STPs, SWPs, and lump-sum investments, enabling precise monitoring and strategic decision-making.

Productivity Tools for Client Engagement

Customized Portfolio Valuation Reports

Delivered at your preferred frequency (fortnightly, monthly, or quarterly) via email, providing clear visibility into your investments.

Pre-Filled Application Forms

Simplify mutual fund investments for both new and existing clients, reducing paperwork and streamlining the investment process.

Risk Profiling and Portfolio Rebalancing

Receive tailored recommendations based on your risk profile and market conditions, with trigger-based options for purchases, redemptions, or switches.

Unmatched Research Support

Monthly CEO Speak

Expert insights from Mr. Satish Pandey

Portfolio Scanner Reports

Comprehensive family-level analysis

Scheme-Specific Analysis

In-depth performance evaluation

Our research is meticulously crafted to provide actionable insights, helping clients navigate market complexities with confidence. The Monthly CEO Speak offers valuable perspectives on market trends, government policies, and economic updates directly from our leadership.

Investment Opportunities for NRIs

Why NRIs Choose India

- India's emergence as fastest-growing major economy creates exceptional investment opportunities
- Government reforms, robust capital markets, and strong banking system enhance investment climate
- NRIs, with world's highest savings rate, increasingly prefer investing in their home country

NRI Investment Account Options

Repatriable Basis (NRE Account)

- Full repatriation of principal and earnings
- Investment via inward remittance or NRE account debit
- Dividends/proceeds freely remittable

Non-Repatriable Basis (NRO Account)

- Investment through NRO account
- Current income (dividends) repatriable
- Principal repatriation: Up to USD 1 million annually (net of taxes)

Mutual Fund Investment Access

General NRIs: Access to all mutual funds open for investment through our platform

USA & Canada NRIs: Limited to 8 approved AMC houses due to FATCA regulatory compliance:

- IDBI Mutual Fund
- Nippon India Mutual Fund
- PPFAS Mutual Fund
- Quant Money Managers
- Samco Mutual Fund
- Sundaram Mutual Fund
- UTI Mutual Fund
- Indiabulls Mutual Fund

Investment Account Requirements

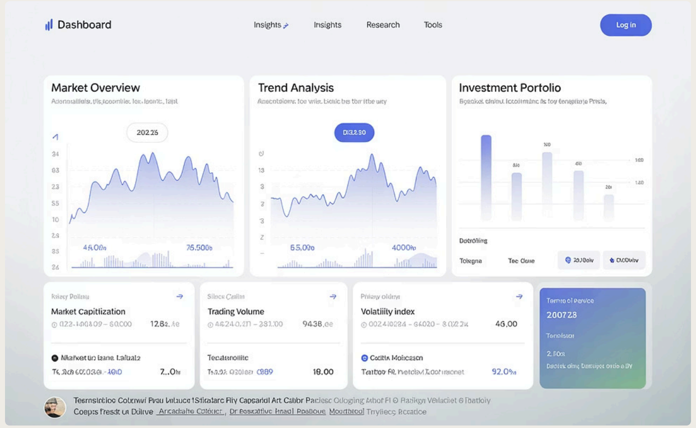
- **Mandatory**: NRE or NRO account with Indian Bank
- Choose investment basis according to repatriation needs

Imperial Value Services Private Limited - Your trusted partner for NRI investments

Empowering Through Education

Investment Concepts

Comprehensive primers that break down complex financial topics into easy-to-understand modules for investors at all knowledge levels.



Market-Event Infographics

Visually engaging content that explains the impact of market events and economic developments on your investment portfolio.

Educational Videos

Engaging video content featuring expert insights on investment strategies, market trends, and financial planning techniques.

Industry Recognition and Trust

21+

Years of Excellence

Over two decades of trusted service in the financial industry

5,000+

Families Served

Thousands of families trust us with their financial well-being

$1B+

Assets Under Advisory

Managing substantial wealth with responsibility and expertise

Imperial Value Services Pvt. Ltd. and Mr. Satish Pandey have established themselves as leaders in the Financial Services Industry. Our consistent delivery of value and client trust has positioned us as a valued partner and distributor for numerous Asset Management Companies.

Awards & Recognition

Our commitment to excellence has been consistently acknowledged through prestigious awards from leading Asset Management Companies across the industry. We have received multiple recognitions for outstanding performance in client acquisition, portfolio management, and service excellence from top-tier AMCs including mutual fund houses and alternative investment platforms. These accolades reflect our dedication to delivering superior investment solutions and maintaining the highest standards of client satisfaction. Our award-winning track record reinforces our position as a trusted partner in wealth management, validated by the very institutions whose products we represent.

Unique Client Empowerment Features

Dedicated Mobile App

View and manage your entire portfolio in real-time, initiate transactions, and track your investment journey with detailed insights.

Door-to-Door Services

Experience personalized financial advice in the comfort of your home with our convenient door-to-door advisory services.

Corporate Social Responsibility

Our commitment extends to financial literacy and community welfare, ensuring we make a positive impact beyond business.

Our AMC Partners

Imperial Value Services proudly collaborates with India's premier Asset Management Companies, offering you access to the best investment products in the market.

We maintain strategic partnerships with 38+ AMFI-registered AMCs, ensuring diverse investment opportunities tailored to your financial goals.

Comprehensive Financial Journey

Assessment

Understand your financial goals, risk appetite, and current position

Strategy

Develop a personalized financial roadmap aligned with your objectives

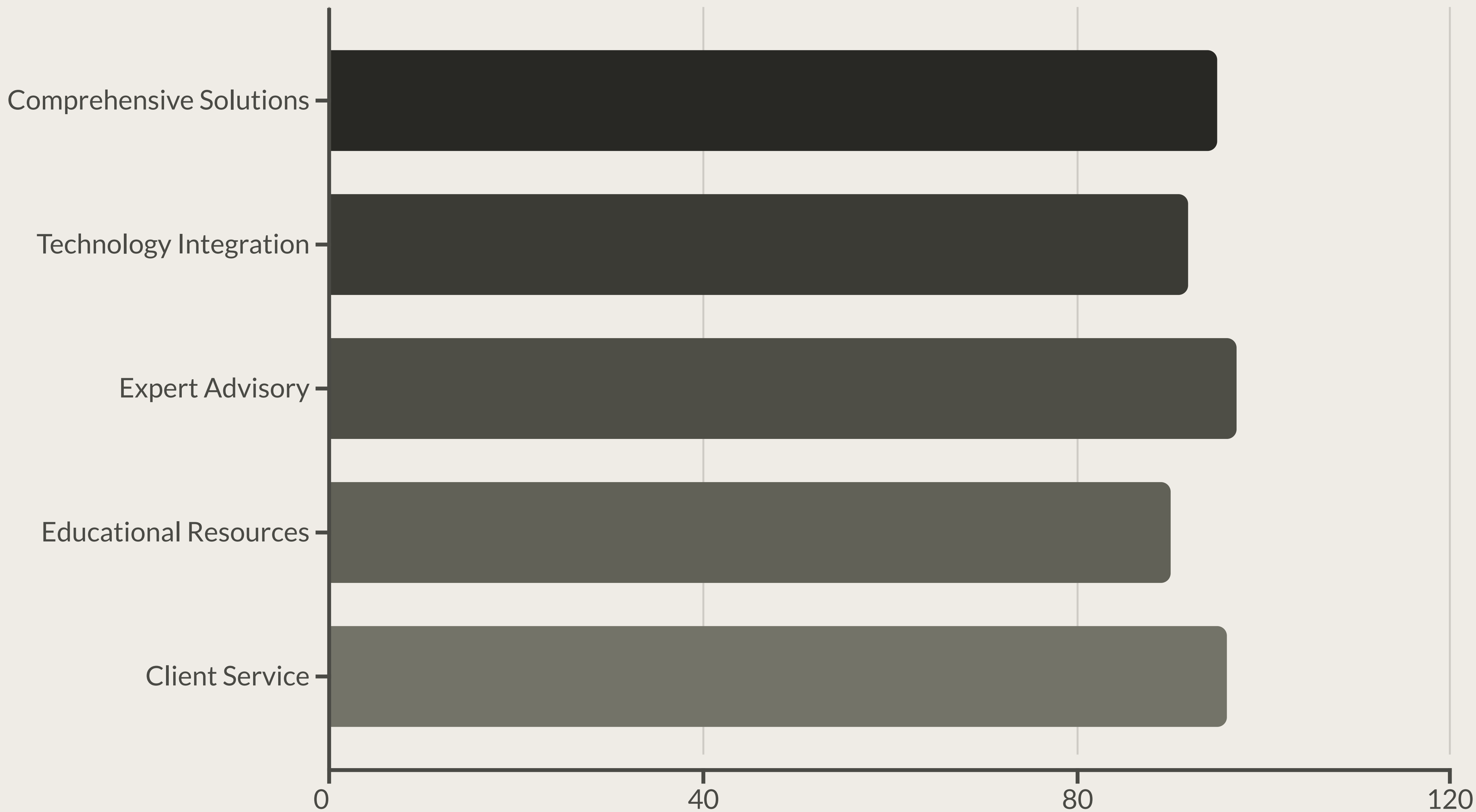
Implementation

Execute your plan with our diverse product offerings

Review

Regular portfolio assessment and adjustments as needed

Why Choose Imperial Value?



In a world of financial uncertainty, Imperial Value Services Pvt. Ltd. stands out as a beacon of stability and innovation. Our comprehensive product offerings, state-of-the-art technology, and unwavering commitment to client success make us the ideal partner for your financial journey.

Whether you're planning for retirement, building wealth, or securing your family's future, we have the expertise, tools, and passion to turn your financial dreams into reality.

Take Control of Your Financial Future

Download the App

Get started with the Imperial Wealth App for instant access to our services

Schedule a Consultation

Meet with our expert advisors to discuss your financial goals

Create Your Roadmap

Develop a personalized financial plan tailored to your needs

Achieve Financial Freedom

Experience the peace of mind that comes with expert financial management

Ready to begin your journey toward financial freedom? Contact our expert team at info@imperialvalue.com or visit www.imperialvalue.com to discover how Imperial Value Services Pvt. Ltd. can tailor solutions to your unique needs. Let's build your wealth, step by step, together.

Contact Us

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Ready to start your wealth creation journey? Contact us today to schedule a consultation with our expert team. We're here to help you achieve your financial goals through personalized investment strategies and comprehensive wealth management solutions.

Disclaimer: Mutual fund investments are subject to market risks. Read all scheme-related documents carefully before investing.