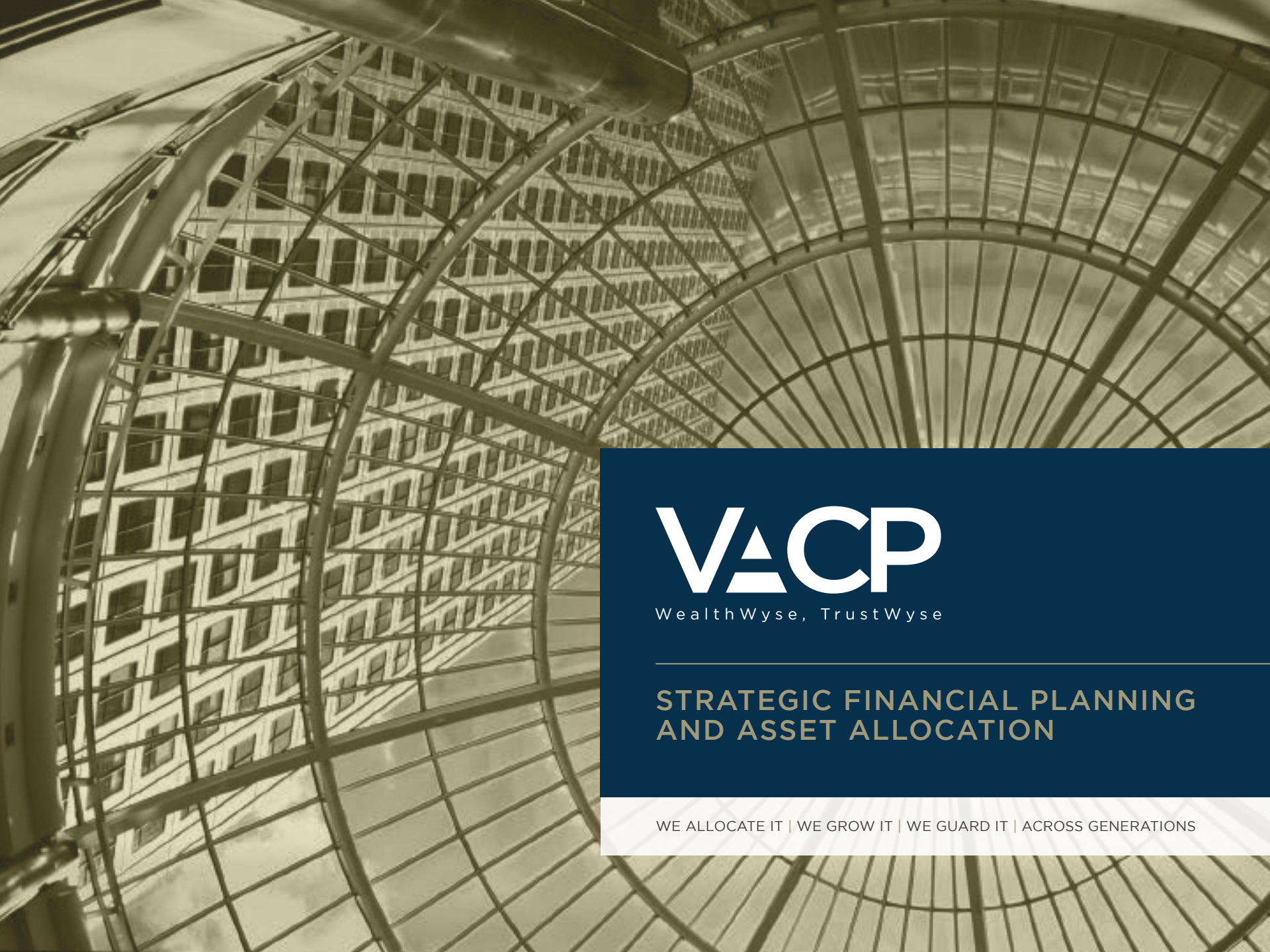




VACP

WealthWyse, TrustWyse

STRATEGIC FINANCIAL PLANNING AND ASSET ALLOCATION

WE ALLOCATE IT | WE GROW IT | WE GUARD IT | ACROSS GENERATIONS

*Trust is the glue of life. It's the
foundational principle that holds
all relationships.*



As life evolves, so does the purpose of our capital. Transitions in every stage of life are natural, but managing them effectively requires foresight.

The wealthiest families often keep a trusted guide who understands that money is not the real goal — it is the tool that must be reshaped at every phase so that one is not just rich, but feels fulfilled, respected, and truly free.

Focussed on
“The Inner Circle”

Your guide for
“Wealth and Beyond”

THE THOUGHT LEADER

*Someone is sitting in the
shade today because someone
planted a tree a long time ago.*

As **Chief Investment Officer** at ICICI Investment Management, Vikas oversaw a Private Equity Fund dedicated to supporting small and mid-sized Indian enterprises. In this capacity, he also served as the Fund's representative on the boards of several portfolio companies.

Vikas spearheaded setting up the Bank's **Private Equity** ecosystem. **Financial Sponsors Group (FSG)**, was the first of its kind by any bank in India, set up to meet the banking requirements of Funds in the space of **Private Equity, Venture Capital, Special Situations**, etc. In addition, Vikas collaborated closely with regulators and industry participants to build the financing framework for **REITs and InvITs**—asset classes that have since grown into meaningful and increasingly popular investment avenues in India.

During his distinguished **27-year tenure at ICICI Bank**, Vikas held several key leadership roles, including **Global Head of International Financial Institutions Group**, Debt Capital

Markets, and Structured Finance. He began his professional journey as an **Equity Research Analyst**, laying the analytical foundation for his career in finance.

He is a qualified Chartered Accountant and has done an Executive course at Wharton. His interests include reading, sports, travelling and active socialising.

Vikas is known for his ability to transform complex issues into actionable insights. This clarity empowers his clients to engage in more focused discussions and make the well-informed decisions required to reach their long-term goals.

Before establishing **VACP Wyse**, Vikas served as the head of ICICI Bank's Private Banking franchise in Mumbai, the financial capital of India. In this capacity, he led a team of more than 300 Relationship Managers and oversaw the advisory efforts for over 25,000 families, guiding them in formulating sustainable and well-diversified wealth-management strategies.

**Vikas Agarwal | Founder,
VACP Wyse**

With a 30-year career spanning Fund Management, Equity Research, and Private Banking, Vikas is a trusted advisor to **Family Offices and High-Net-Worth Individuals**, delivering deep insights rooted in rigorous Equity Research.



*Know what you own,
and know why you
own it.*



SUITE OF SERVICES

One partnership. Limitless pursuits. Your wealth grows with precision, flows without friction, and transitions to the next generation flawlessly — untouched, unquestioned, and unmistakably yours.

We deliver uncompromising pillars of generational wealth.



1. Indian Equities, Alternatives, Real Estate

we grow your capital through simple, uncorrelated investment strategies across asset classes, always executed in the most tax-efficient structures available.



2. GIFT City (Non-Resident Indians, Global markets for Resident Indians)

for Non-Resident Indians, we unlock India's growth story through seamless, optimally repatriable, tax-optimised investment routes. We also enable Resident Indians to invest in global markets by facilitating LRS funds.



3. Global residency and citizenship

for families willing to expand globally, we help secure the world's most valuable residencies and citizenships — not as vanity projects, but as genuine enhancers of mobility, security, and opportunity.



4. Growth Capital (Equity and Debt)

for businesses that need capital and Promoters are evaluating options to raise capital through private equity, IPO (Main Board / SME Board), debt or through strategic sale or partnerships.



5. Succession and Inheritance Planning

we help you consolidate your wealth for the long term with very thoughtful succession planning, family governance frameworks, and contest-proof trusts that prevent disputes among heirs from ever touching your legacy or your operating businesses.

VACP Inner Circle Sporting Access

Through our strategic partnership, VACP Inner Circle members gain unrivaled access to the world's most prestigious sporting arenas. This collaboration ensures priority access to ticketing for high-demand global events and enhanced hospitality. By leveraging our collective scale, we provide exclusive pricing and a seamless booking experience that places you at the heart of the action.

*The essence of
investment management is
the management of risks,
not the management
of returns.*



OUR PROCESS AND COMMITMENT

The majority of our long-term investment returns come from getting our asset allocation right, more than from stock picking or market timing

1 Intensive conversations

At VACP, we believe that every successful investment journey begins with deep self-awareness.

Our team engages directly with each individual, offering

- Clear, Thoughtful explanations - of the risks tied to every asset class
- A high-touch, transparent approach - ensuring that sophisticated investors can make informed decisions
- Construction of portfolios - built for long-term stability and growth

2 Asset Allocation

Guided by conversations and understanding, our team designs

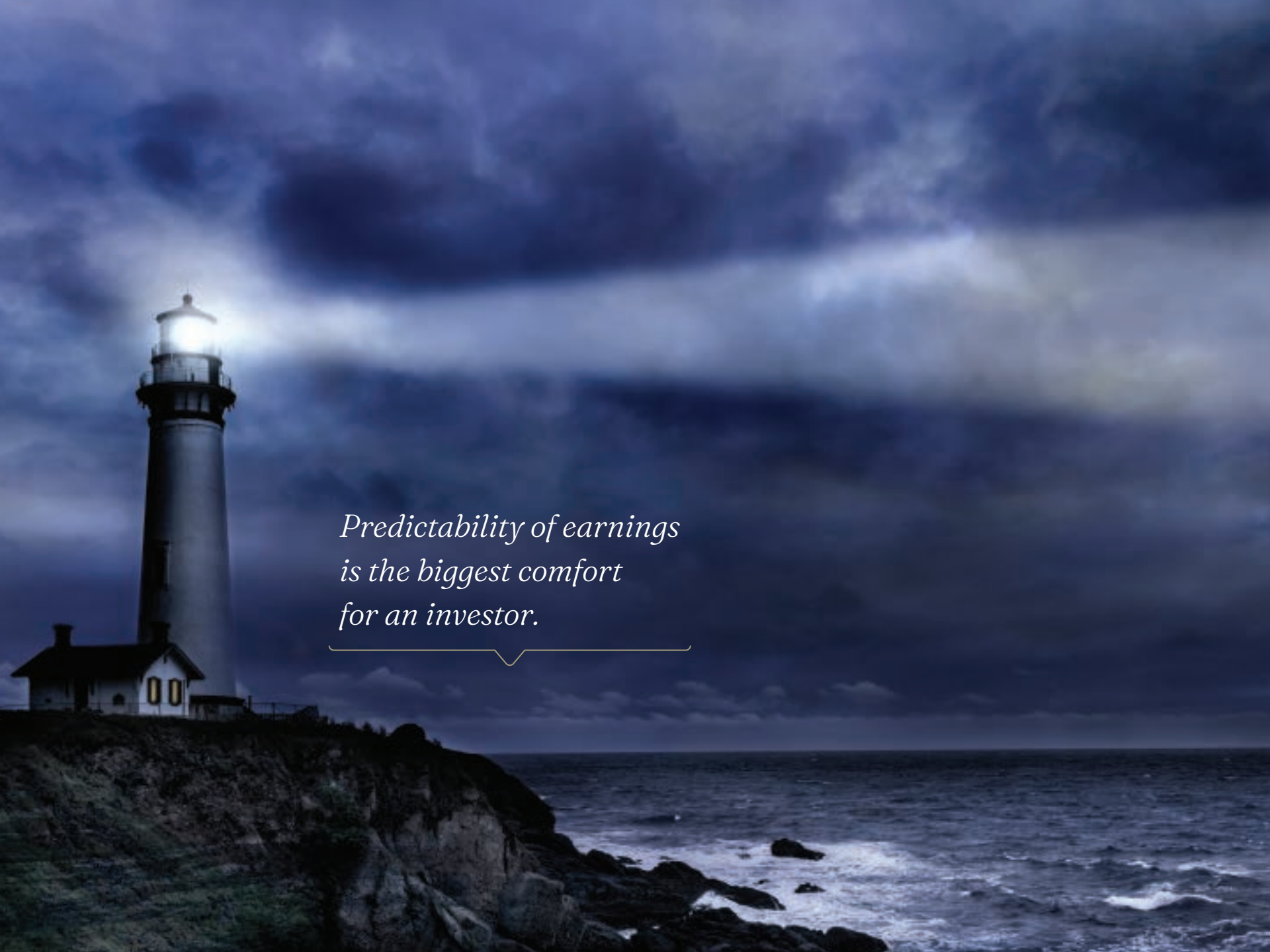
- Disciplined and Diversified portfolio
- Right mix of asset classes — equities, fixed income, gold, real estate, and alternatives
- Tailored to your goals, time horizon, and emotional comfort

3 Relationship versus transactional

Most importantly, we don't "set it and forget it." Your portfolio is Continuously Monitored and Systematically Rebalanced - whenever it drifts from the agreed target allocation or when your life stage, goals, or market conditions change.

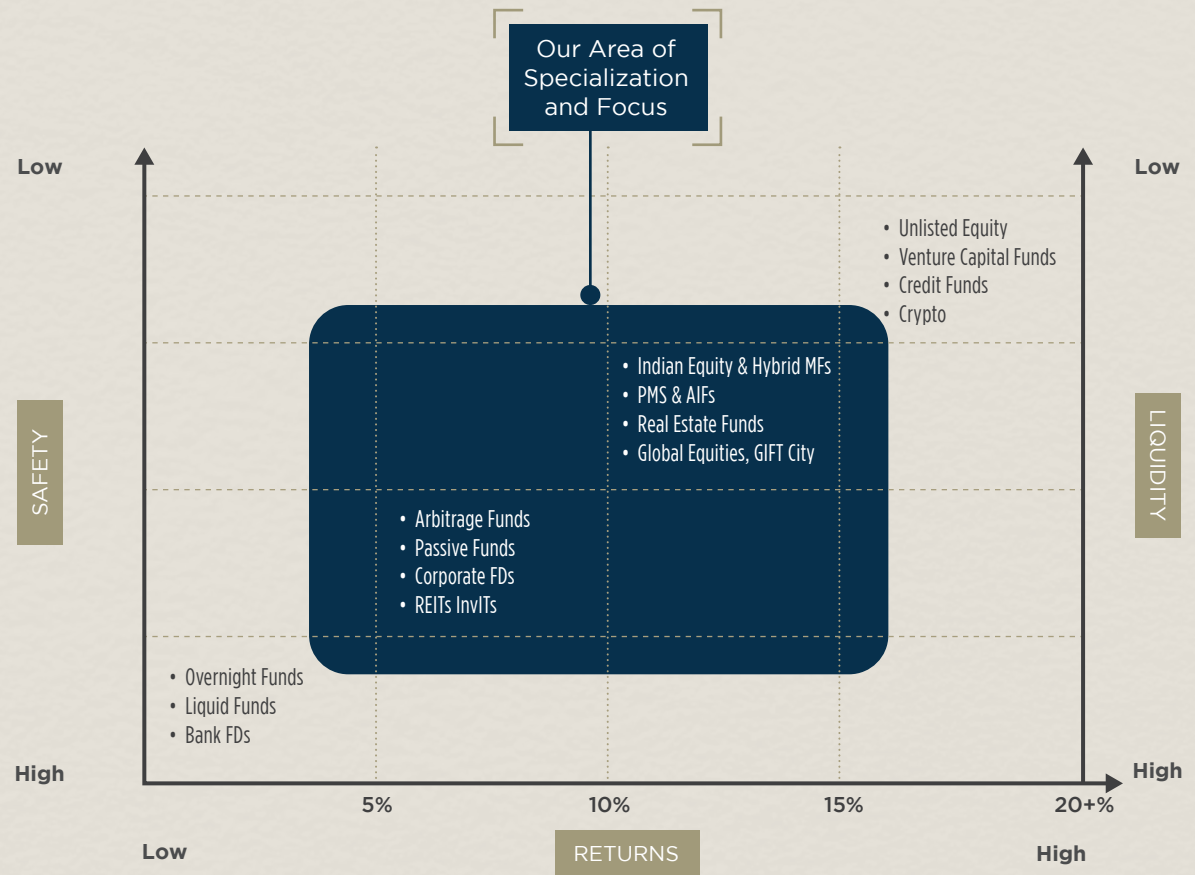
This disciplined, ongoing process keeps

- 'Emotions' out of decisions
- protects you from 'Unnecessary Risk' & 'Impulsive Decisions' and
- keeps your wealth 'Steadily Aligned' with your evolving needs

A tall, white lighthouse stands on a dark, rocky cliff. The lighthouse is illuminated from within, casting a bright glow. At its base is a small, white, single-story building with a dark roof and two yellow-lit windows. The sky is filled with dark, heavy clouds, and a bright light source, possibly the sun or moon, is partially obscured by the clouds behind the lighthouse. The ocean is visible in the foreground, with white waves crashing against the rocks at the base of the cliff.

*Predictability of earnings
is the biggest comfort
for an investor.*

SLR - SAFETY, LIQUIDITY, RETURNS



We can also curate 'bespoke' and 'concentrated' portfolios for our High Net-worth Clients

A low-angle shot of a rock climbing scene. In the foreground, a person wearing a teal helmet and a grey jacket is seen from the side, holding a green rope. In the background, two other climbers are on a steep, textured rock face. One climber is higher up, wearing an orange shirt and dark pants, while the other is lower down, wearing a white shirt and dark pants. The sun is shining brightly from the top left, creating a lens flare effect. The sky is a clear, pale blue.

*Your success as an
investor depends less
on intelligence than
on temperament.*

WEALTH IN INDIA

INCOMING OPPORTUNITIES, INVESTMENT DISCIPLINE

The BSE Sensex has scaled a new life-time high for the ninth straight calendar year



Business Standard
Nov 27 2025 | 1:29 PM IST

Sensex hits new high amid optimism over India's growth story. On an average the sensex has surged 14.8% in the past 8 years when compared to the previous year high.

How Indians are becoming millionaires?



Jarvis
Dec 19 2024 |

In India, as of 2024 data, there are over 3,26,400 millionaires. Indian people now understand that there are only two ways of making money – earn money from one source and compound your savings by investing.

Family Offices in India surge to 300



Times of India
Jun 26 2025 | 11:25 PM EST
The number of Family Offices in India has risen sharply to about 300 in 2024, from just 45 in 2018, reflecting a significant shift in how ultra high network families manage their capital, an EY-Julius Baer report has found.

India's millennial and Gen Z heirs are redefining family wealth

CNBC India
Nov 13 2025 | 6:22 PM EST
The next generation is not solely focused on wealth preservation, but also creating more of it through high-risk investments that generate alpha.

Record Rs 80 lakh crore (USD 890 billion) Mutual Fund AUM

Whalesbook
Dec 11 2025 | 10:17 PM IST
Indian mutual funds have crossed a historic milestone, with total assets under management (AUM) surging past ₹80 lakh crore in November for the first time.

India's \$3.3 trillion opportunity for global fund houses



CNBC
Dec 11 2025 | 3:51 AM EST

Indian retail investor-driven mutual fund assets are expected to touch \$3.3 trillion by 2035, according to a Bain report. Global companies, from the U.S. to South Korea, are looking to list their Indian business units, building on the boom in the country's primary market, and offering fund houses more avenues to invest.

India records 3rd rating upgrade in FY26



Livemint
Sep 18 2025 |

Japan's R&I raised India's long term rating to BBB+ following similar upgrades by S&P in August and Morningstar in May. A stronger credit rating enhances India's standing in global capital markets.

76% of wealthy Americans work with a financial advisor

2025 Wealthtender Study

Advisors focus on planning strategies to achieve their long-term financial goals, from legacy and succession planning to philanthropy, allowing high-net-worth individuals to focus on their family, career, and enjoying life while delegating wealth management to professionals.

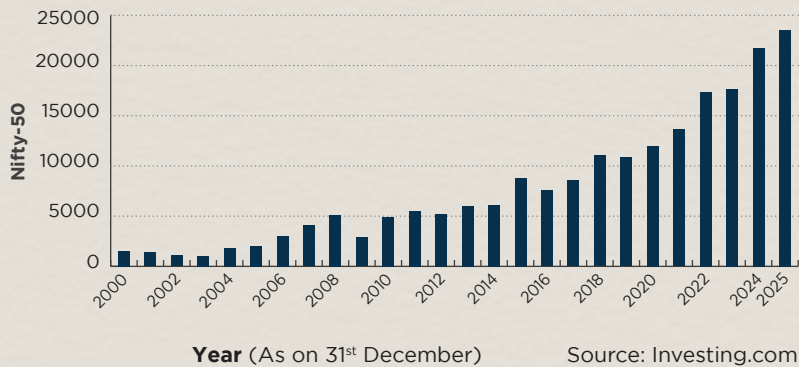




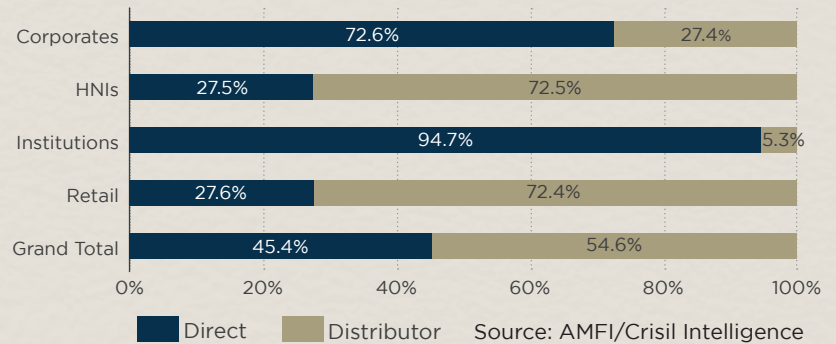
*The first rule of compounding:
never interrupt it unnecessarily.*

THE GROWTH STORY

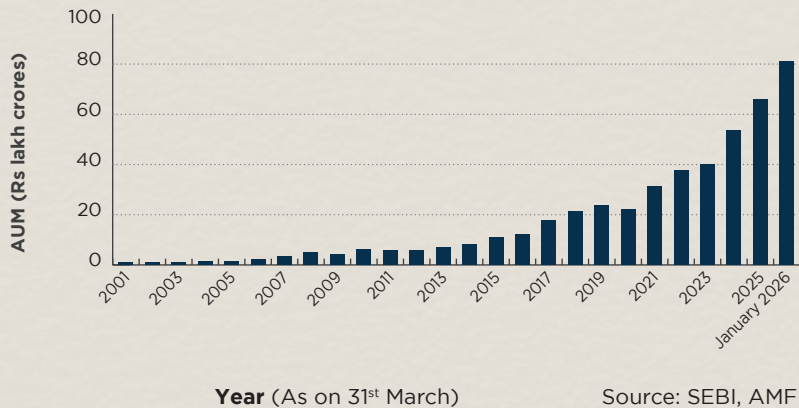
Nifty-50 has grown 20.83 times in last 20 years



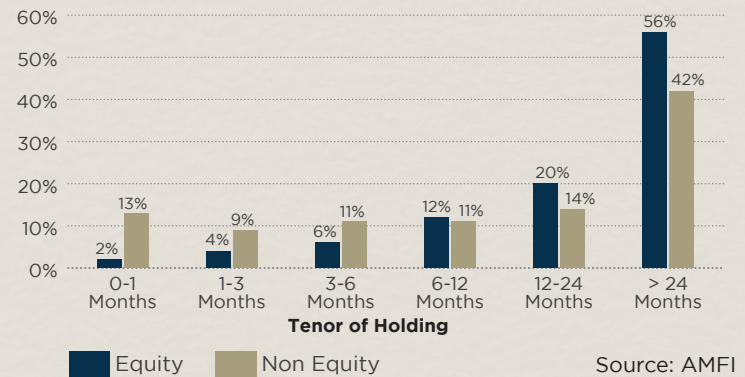
More than 72% Retail & HNI customers still prefer to take guidance



Mutual Funds' AUM has crossed Rs. 80 lakh crores



76% of Industry's Equity Assets stay invested for more than 1 year



*An ecosystem is not
a collection of things,
but a web of relationships.*



CORE COMPETENCIES

Domain Expertise in Equities & Alternatives

- Proprietary Fund Management Experience.
- Integrating understanding of Macro Economics & Public Markets, supporting disciplined capital allocation.
- Early involvement with New-Age Asset Classes like REITs & InvITs.

Research-Led Investment Framework

- Research-Driven Investment Decision Making.
- Multi-Asset Product Due Diligence.
- Tailored Portfolio Architecture.

Advisory Ecosystem

- Advisory Depth Backed by strong multi-disciplinary team of experts.
- Extensive Corporate & Industry Connect helping clients build meaningful inroads, partnerships, and strategic connections.

Industry Network

- Institutional Connectivity in Public Markets enabling informed, dialogue, and insight across public equity strategies.
- Sponsor & Capital Ecosystem Access facilitating capital-raising opportunities for businesses and growth-oriented enterprises.



THE TRUSTED GUIDES



Haridas Bhat

Haridas Bhat is a Partner at GMJ & Co., having deep expertise in FDI policy and FEMA, advising Indian entities in cross-border business expansion. He also specialises in inheritance and succession planning, trust formations, family governance and asset protection strategies for high-net-worth individuals and families across generations. He further specialises in drafting testamentary and revocable wills compliant with the Indian Succession Act and Hindu Succession laws. He also advises on family settlements to minimise estate duties and litigation risks.



Jayesh Parekh

Jayesh is a veteran of the equity markets with over 30 years of experience spanning Research, Sales, and Fund Management. An All-India Rank-holding Chartered Accountant (AIR 8th), his career includes tenures at prestigious institutions such as the Abu Dhabi Investment Authority (ADIA), Motilal Oswal and ICICI Bank. Notably, he was ranked the #1 Salesperson in India for two consecutive years by Asiamoney. Today, he leverages his deep expertise in understanding economic shifts and corporate performance both as an investor as well as a member of a prominent wealth firm's Investment Committee.



Paresh Karia

Paresh, Founder of Acquest Advisors, is a leading expert in Global Residency and Citizenship solutions for Indian families, students, and business leaders. With over 20 years of experience across immigration, global investments, and banking, he is a trusted voice in the industry. A frequent commentator on CNBC and NDTV, Paresh also contributes to Forbes, Fortune, and Moneycontrol. A qualified Chartered Accountant and former senior leader at HDFC, ICICI, and ABN AMRO, he now leverages his YouTube platform to simplify investment migration for a global audience.



Pratik Chaudhary

Pratik, Co-founder of Finwert, is a Chartered Accountant with 15+ years of experience specializing in startup structuring and compliance. An expert in stakeholder management, he has driven growth, investment, and expansion for clients including Rapido, Cityflo, Khatabook, and Zoomcar. Based in India, his consultancy provides strategic oversight for scaling high-growth ventures.

Many Specializations. One Vision.



Rajiv Kacholia

Rajiv is an honors alumnus of Stanford University with a career spanning \$22 billion in transactions across five continents. Following M&A roles at Goldman Sachs (New York) and Lazard, he led Global Strategy for GE Capital and served as Head of Corporate Development at DE Shaw. Beyond finance, Rajiv has advised two U.S. Senators and the NYC Economic Development Council. A two-time U.S. State Champion Debater, he is the Founder of Speech Debate India, having mentored 3,000+ students globally. He also served as Board President of the American School of Bombay and chaired Stanford's undergraduate admissions interviews for South, Central, and Western India.



Surendrakumar Agarwal

SK, as he is lovingly called, is an Advocate and Tax Consultant with nearly 60 years of experience in Direct Tax laws. An active investor and mutual fund distributor since 1979, he has navigated every bull and bear market since the BSE Sensex's inception. His deep historical perspective provides unique insight into evolving tax structures and the generational shift from physical to financial assets.



Vikash Sharma

Vikash, Founder of SV Finance & Investments, leverages over 28 years of global banking expertise across India, Singapore, the Middle East, and Canada. Previously, he served as President and CEO of ICICI Bank Canada. His leadership tenure includes serving as Group Head for the Middle East and Africa and Head of Corporate and Commercial Banking for Southeast Asia. A dual-qualified professional, Vikash is a Chartered Accountant (AIR 3rd) and a Cost Accountant (AIR 7th). Today, he leads a global footprint with offices and affiliates in the UAE, Canada, India, Singapore, and the UK.

CO-FOUNDER



Anmol Agarwal

Anmol is amongst the first 1000 Registered Investment Advisor (RIA) in India and a certified PMS Advisor who has successfully transitioned from a high-pedigree corporate background to a thriving entrepreneurial career. Single-handedly scaling an impactful AUM, he demonstrates an exceptional ability to manage end-to-end client relationships while building robust, tech-enabled operational frameworks. An alumnus of Bombay Scottish, NM, and HR College, his journey is defined by a "founder-first" mindset—from his early days interning at KPMG to building a private advisory practice rooted in a deep understanding of how global geopolitics shifts asset classes.

A black and white photograph of a chessboard. In the foreground, a dark wooden king piece stands prominently on a light-colored square. In the background, a light-colored pawn piece is visible on a dark square, slightly out of focus. The chessboard's alternating light and dark squares recede into the distance. The background is a solid black.

*Generations change,
principles endure.*

THE MINDS BEHIND VACP

BUILT ON TRUST. POWERED BY THE FUTURE.



Vikas Agarwal
Founder

Visionary
Long-term focused
Institution Builder
Trusted and Principled
Insightful



Anmol Agarwal
Co-Founder

Avid reader
Tech-savvy
Agile
Dynamic
Digitally fluent



A close-up, shallow depth-of-field photograph of two individuals in business attire. On the left, a person in a dark blazer holds a white ceramic coffee cup. On the right, another person in a dark suit jacket also holds a white ceramic coffee cup. Both individuals have their hands open and gesturing, suggesting an active conversation. The background is a bright, out-of-focus window with greenery visible outside. The overall mood is professional and collaborative.

*Every enduring
partnership begins
with a conversation.*

CONTACT US

VACP Wyse LLP

1508, Corporate Annexe,
Sonawala Industrial Estate,
Goregaon East,
Mumbai - 400 063. **INDIA**

Email: vikas.agarwal@vacp.in,
anmol.agarwal@vacp.in

Mobile: +91 982 102 2315, +91 740 047 7729



VACP
WealthWyse, TrustWyse

WEALTH AND BEYOND
“THE INNER CIRCLE”