

Samrat Investments Schemes Information



In the unpredictable and technology-paced asset management industry, as a client you must have customizable saving schemes, data-oriented decisions and humane experience to manage your portfolio.

Samrat Investments offers an ‘unregistered fund’ due to it’s exclusive concept of investment options. Which include expected + guaranteed, which don’t fall in a defined category from SEBI either guaranteed or stocks (subject to risk).

‘Both expected + guaranteed return concept’ is rarely applied by financial institutions globally, which can majorly benefit the investors by ensuring their loss and expectations positively. By increasing transparency of real-time data and balanced portfolio management.

The particulars of the schemes haven’t been prepared in accordance with the Securities and Exchange Board of India (Like Mutual Funds) Regulations, 1996 (hereinafter not referred to as SEBI (MF) Regulations) as amended till date, and not filed with SEBI, neither a Due Diligence Certificate from the AMC.

While your investment must be made on your personal decision for your future growth, whereas Samrat Investments has consistently maintained an average return of 18- 23% since 2015.

Managed by Samrat Investments (investment management)

Scheme	Scheme suitable for the investors looking:	Risk*
Piggy Valley Plan	Customizable - Capability to create infinite unique schemes based on individuals requirements.	Zero
SamVan Lifetime Plan	Long term investment	Zero
Global Growth Plan	Mid-term investment	Zero
Student Growth Plan	Specialized for students	Zero

* Guaranteed return is applied in every investment which offers minimum return startin with 6%.

Scheme	Minimum investment	Maximum investment	Guaranteed return
Piggy Valley Plan	₹ 100 (SIP & lump-sum)	No limit	8%+

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SamVan Lifetime Plan	₹ 240 000 (Urban) ₹ 200 000 (Rural)	No limit	16%
Global Growth Plan	₹ 65 000	No limit	10%
Student Growth Plan	₹ 10 000- (Maximum)	₹ 1 700 000	8%

* Return rate starts with 8% for 2 years. Investment can't be withdrawn before 2 years.

Scheme	Flexibility	Installment
Piggy Valley Plan	(SIP and lump-sum)	Customizable
SamVan Lifetime Plan	(SIP and lump-sum)	Monthly, Quarterly, Half yearly and Yearly
Global Growth Plan	(SIP and lump-sum)	Monthly, Quarterly, Half yearly and Yearly
Student Growth Plan	(SIP and lump-sum)	Weekly, Monthly, Quarterly, Half yearly and Yearly

Purchase of scheme

- Funds are accessible anytime online for you to add in your portfolio.
<https://www.samratfinancialbanking.com/personal-savings>
- Funds/ schemes shall not be sold by anyone fund managers, independent advisors or financial institutions without prior authorization from the Trustee.
- Funds/ schemes shall not be sold offline or via any unauthorized form.

Charges of services

Consulting under normal circumstances and during the investment by potential investors for any scheme is Free, under financial education and empowerment.

Investors shall be required to pay for the advisory other than scheme analysis based on standard charges requested by Trustee prior to consulting.

Special considerations

- Scheme is designed to profit investors from diverse domains. Purpose of the scheme is to maximize profit for the potential investor without stressing on loss and risk of investment.

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- Potential investors should study the scheme details and understand financial planning properly before making their investment or sign up for any schemes.
- Neither above schemes or advisory related to the scheme is registered with regulatory bodies.
- The distribution of schemes is limited as per regulatory bodies, investors ensure their compliance before making an investment/ sign up / purchase any associated products or services..
- The AMC, Trustee or the Mutual Fund have not authorized any person to issue any advertisement, offer consulting/ advisory, scheme recommendations or to give any information or to make any representations, either oral or written, other than that contained in this scheme information document in connection with all the schemes. Potential investors are advised not to rely upon any information or representation not incorporated in the scheme information document as having been authorized by the Mutual Fund, the AMC or the Trustee.
- Redemption due to change in the fundamental attributes of a scheme or due to any other reasons shall not affect your taxes as this scheme doesn't cover any tax benefits. The Trustee, AMC, Mutual Fund, their directors or their employees shall not be liable for any such tax consequences that may arise due to purchase or sign up of any scheme.
- As the liquidity of a scheme's investments may sometimes be restricted by installment volumes and settlement periods. In view of this, the Trustee has the right, in its sole discretion, to limit redemptions under certain circumstances.

Portfolio and scheme

Authorized fund manager from the Trustee.

Cutting edge technology under the guidance of financial experts and trustee.

Investment Strategies

The purpose of the scheme would be to bring sustainable growth and to seek long term capital appreciation by investing primarily in the diverse segment of business and startups.

The fund manager along with cutting edge technology will embrace balanced portfolio management to maximize the returns.

Parameter which will take a crucial part:

- Benefits and happiness of the clients
- Sustainable growth of Mother nature
- Strategic growth and progress of India economy
- Futures and forecast of certain segment having valuable impact
- Empowering small business and strengthening social innovation to benefits end user
- Expanding financial segments and Trustee long-term pursuit

Withdrawal Plan

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- Potential investors shall withdraw their investment only after the period of 2 years or based on scheme tenure,
- Withdrawal of total investment can be made within 30 days of investment without extra charges,
- Withdrawal after 2 years and before complete tenure might affect total benefits along with a 17% penalty of total investment,
- Settlement shall be done within 45 days of tenure completion or based on investor requirement of investment,
- Investors shall complete withdrawal form within 72 business hours for the expected withdrawal,
- Investor withdrawal amount of investment is settled within 72 business hours,
- Trustee have the right to cancel or suspend the withdrawal request of investors if investment tenure is not completed.
- Trustee have the right to cancel or suspend the withdrawal request under certain circumstances: i) Operational or technical issues, ii) Unexpected emergencies or crisis, and iii) Trustee facing an unexpected failure or loss.

Extra charges/ fine

- Investors might have to pay extra charges of 3- 7% of current installment if investment is not made within 3 days of installation date, applicable for monthly, quarterly, half-yearly and yearly schemes.
- Investors might have to pay extra charges of 3- 7% of current installment if investment is not made on the date of installation date, applicable for daily, weekly, bi-weekly, bi-monthly, or installation tenure less than 28 days.
- Investors might have to pay up to INR 1 500 000 charges, if the account is closed and required to re-apply.

Miscellaneous Information

* Interest rate varies with the period of investment. Example: For 2 years assured return is 8%, or 19% assured return for 13 years. (Live value and additional bonus for long-term is applied automatically)

** If investors wish to discontinue with current services of saving schemes, investors can request to close your account within 30 days. Investors balance will be refunded.

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1. Live value: Real-time value of Samrat Investments' commerce. Can be updated any moment {Investors profit return value is either assured 8- 23% or expected 'Live value' (Whichever is higher).}
2. Personalized/Customized- Custom made financial plan just for investors on investors mark/request. In which investors can customize their amount, tenure, installation, even name of financial plan.
3. There will be no extra charges for the financial planning or expert consulting during account opening.
4. Minimum saving period is 2 years for any scheme.
5. Saving amounts can be customized in lump-sum or systematic planning based on your feasibility.
6. Extra .5- 2% bonus half-yearly is added apart from live value for the long-term savings.
7. Investors profit return is compounded yearly with increments of .5%, (Under certain schemes, 1% & 2%) starting with 6%. i) .5 extra return every half yearly + live value/ assured return for 20 years. ii) 1% extra return every half yearly + live value for 40 years saving. iii) 2 times the age of investment + bonus for 40 years- 60 years.
8. There is **NO hidden term & conditions** or policy for the benefits if you are saving as of schemes or timely.
9. .75% extra return is added in overall benefits to senior citizens, independent women and forces.
10. Adding up to 6% extraaa profit, with overall profit. (To self independent, single parent mother and youth)*. Connect support.
11. **For fathers**- Up to 4.7% extraaa on complete benefit (If investors are saving for their father)
12. **For fathers**- Up to RS. 17 200 yearly extraaa on complete profit (If investors have more than 3 girl child, on saving for the higher education)
13. **For farmers**- Up to 40% reimbursement on seeds, fertilizers & logistics.* Data to be updated soon.