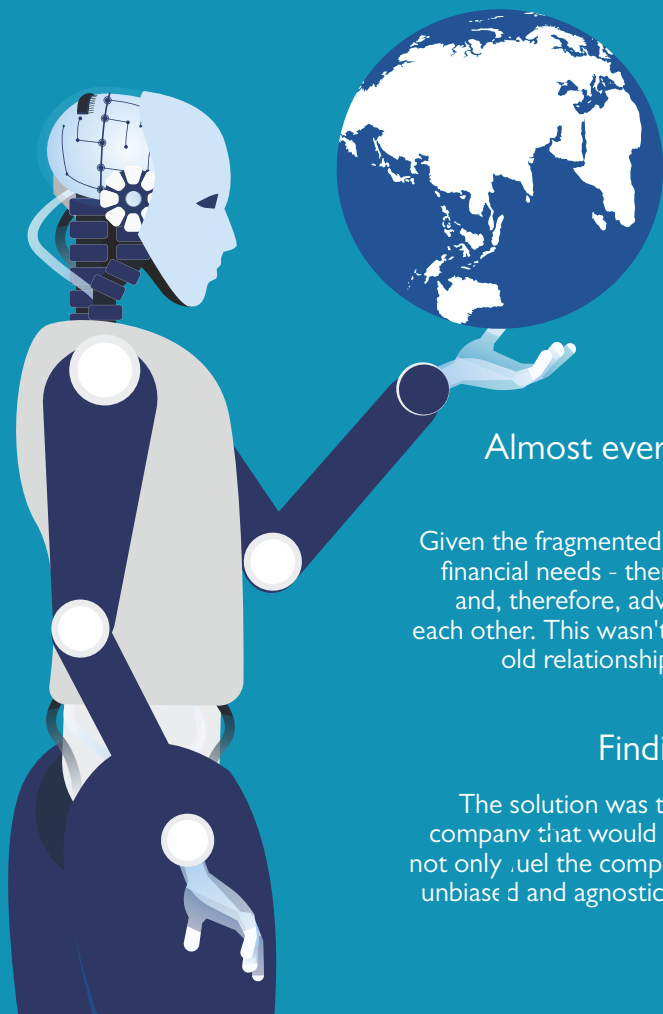


robotic efficiency | human values

all to make the most of your investments



Meet Plutus

Technology is rapidly evolving all around us.
Almost every industry around us is being transformed by it.
Why not finance?

Given the fragmented nature of our industry - with multiple touch points for multiple financial needs - there were always bound to be personal advisor biases creeping in and, therefore, advise that would more often than not, work at cross-purposes to each other. This wasn't actually good news for investors. But with a comfortable, age-old relationship going between advisor and investor, breaking the nexus was a challenge.

Finding a solution to this poser was our entry point.

The solution was to build Plutus - an always-online, fully integrated robo-advisory company that would be supported by a very powerful engine. The algorithms would not only fuel the company, they would also fully understand your financial needs, offer unbiased and agnostic investment advice and give you the ability to execute decisions online from the comfort of your homes.

Plutus is here to make you believe again...

offline services

We understand there are apprehensions while investing your hard earned money and the need to take suggestions from knowledgeable professionals, in-person, is very important. It is for this reason, we have created a unique hybrid advisory environment where you can discuss the way forward on your investment decisions across the table with us.



financial planning



risk and protection



real estate



mortgages advisory



chartered accountancy services



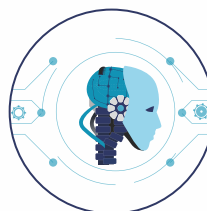
estate and succession planning

online services

Your confidence to make and implement your investment decisions on your own prompted us to create a virtual environment which would offer unbiased advice. Our robo - Plutus will guide you through these service offerings.



wealth management



robo-advisory services



intuitive portfolio tracker

*I want to send my parents
on a holy pilgrimage.*

*Go for the Cricket
World Cup.*

*We dream of sending
our children to IIT.*

*We want to give our
children a grand wedding.*

*Buy a holiday home in the
hills for my retirement.*



Envision Financial Planning

Start early; get there first

Every dream is as special as the person who dreams it.

What's yours?

Why you must plan your finances.

Like most people, you have hopes, dreams, and life goals for yourself and your family; but the pressures and complexities of everyday life can make setting and achieving financial goals difficult.

That's why it makes good sense to have a financial plan in place.

67% of all investors
in India follow an informal
advice system which is
neither scientific nor
grounded in any reality*

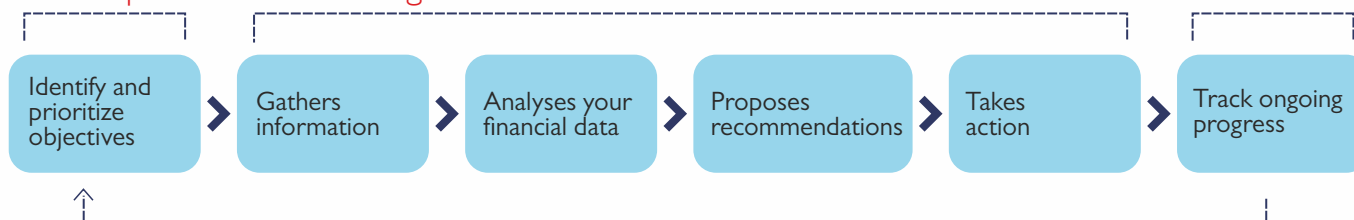
How do we do this?

Solving financial issues one at a time makes it harder for you to get to where you want to be. We apply a disciplined financial planning approach:

You aspire

Plutus designs

We track



We believe that financial planning is a long term collaborative relationship, one where you and your advisor work together

- to define your dreams
- to develop a plan to help you get there
- to make changes as needed & track your progress along the way

Wealth management is a consultative process *and we cannot emphasise enough that* one-size-DOES NOT-fit all!

A fine confluence of robotic wealth management and individual experience - we have created a digital environment which will cater to your investment needs.

To do this, “We” - the Humans and “Plutus” - the Robot, are working in unison!

Currently there are over 2500 unique mutual fund schemes and more than 15000 variants of these schemes in India. To reduce the clutter, we incorporate Plutus' complete potential to curate the best funds to make your investment decisions simpler and more effective!

Liquid
and
Ultra Short
Term Funds

Short,
Medium and
Long Term
Debt Funds

Balanced
and
Equity Savings
Funds

Small,
Mid, Large
and
Diversified
Funds

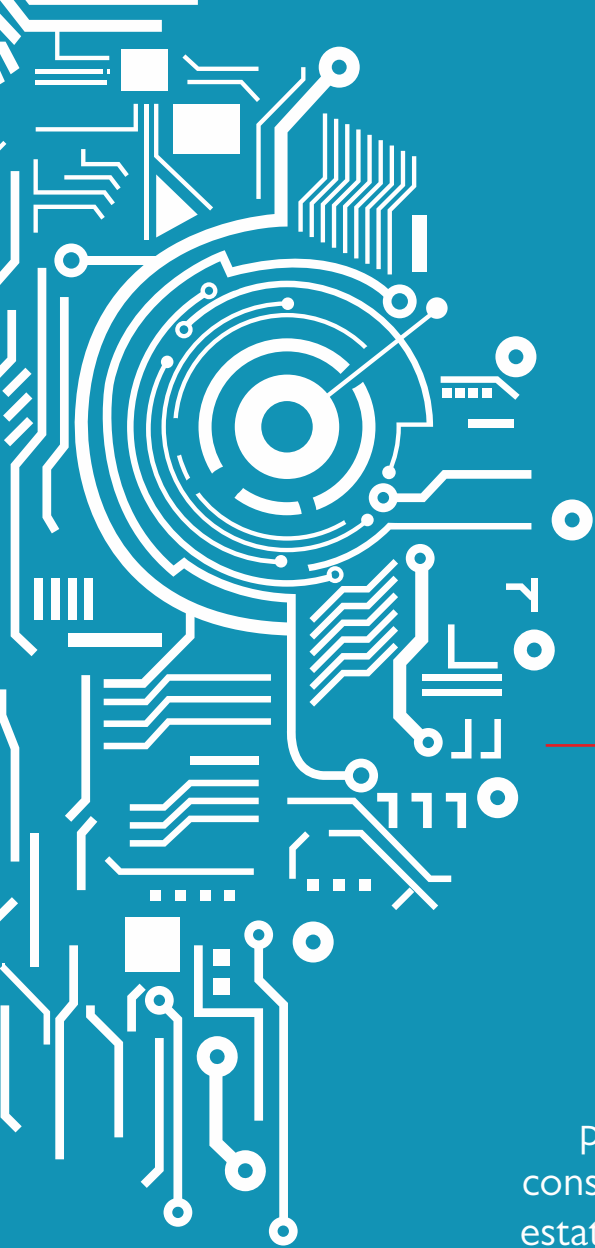
Thematic
and
Sector Specific
Funds

Global and
International
Funds

Corporate
Fixed
Deposits and
Bonds

Portfolio
Management
Services and
REITs





Our Value Proposition

We have created a unique online model where all financial services and products are available in a structured and professional manner on a single platform.

The advice offered is relevant to individual needs and is supported by powerful algorithms. This removes all human intervention and makes the advice completely unbiased.

India's most advanced and intuitive multi-asset portfolio tracker called 'The Vault' has the ability to consolidate all capital markets, insurance products, real estate and non-market linked investments in one place.

'The Vault' also offers you the ability to add your family's accounts in a single place, so that you always stay on-top of all your family investments.

Plutus will guide you through your investment process with his unique tools.

Lump
Sum
Planner



When you have some idle money and you are unsure of where and how to invest the same, use Plutus's prowess and let him help you get the answers in the most unbiased way possible.

Systematic
Investment
Planner



Plutus helps you when you want to achieve a financial goal in the future and don't know where to start; he will break down your investment goals in simple and achievable monthly tranches to ease out your investments.

Goal
Based
Planner



You have a goal you want to achieve now. You have investments you made in the past. Ask Plutus to link them together so there is a purpose to your investments and achieving goals becomes easy.

Remove the suspense; get protected to combat the not so favourable times

Life Insurance



- Endowment Insurance
- Insurance for Children

- Term Insurance
- Money Back Policy

- Unit Linked Plans
- Retirement Solutions

General Insurance



- Medical Insurance
- Motor Insurance

- Travel Insurance
- Accident Insurance

- Household Insurance
- Fire Insurance

Group Insurance



- Group Health
- Engineering All Risk

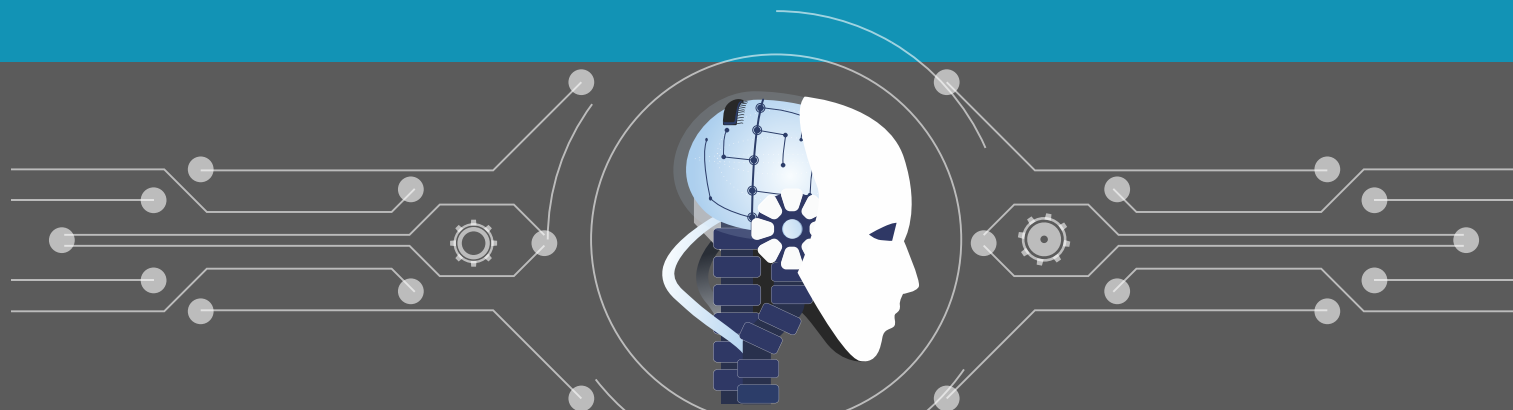
- Fire & Marine
- Construction Risk

- Group Gratuity
- General Liability

24 LIFE
INSURANCE
COMPANIES

20 NON-LIFE
INSURANCE
COMPANIES

06 HEALTH
INSURANCE
COMPANIES



Plutus also helps with:

Real Estate and Mortgages Advisory

The Indian real estate sector has come a long way and is today one of the fastest growing markets in the world.

We have partnered with two of the largest International Property Consultants (IPC's) in India to provide advisory services in this complex and vast sector.

Estate and Succession Planning

Wealth Preservation and Wealth Transfer require in-depth knowledge and specialized skills that need to be learnt and practiced.

To ensure that you receive the best possible advice we have joined hands with a leading estate and succession planning company who will partner us in developing tailor-made solutions for you.

Chartered Accountancy Services

To offer our clients the very best advice in matters of personal and corporate taxation, we have joined hands with a well-established chartered accountancy firm who will offer advice on the following matters:

Personal Income Tax | International Taxation | Goods and Services Tax | Audits | Company Law Matters

PLUTUS 'Bridges' with resurgent

Research has shown that the vast majority has never considered regimented financial planning as a tool for saving for a rainy day. They have put away what they could, when they could – without a plan or an objective. However, there is also a small school of people for whom personal finance is deeply linked to one's dreams, ambitions, hopes and plans. Bridge Investment Advisors Private Limited brings Plutus - an idea, a notion, a promise to bring the best, most accurate, state-of-the-art services in personal financial management to the largest cross-section of people.

Personal Finance is tricky waters – a multitude of aspirations and goals of varying order, a dense and changing set of rules and regulations and the threat of unscrupulous sharks always in the vicinity. We therefore believe that the need of the hour is to provide a personal financial service that is clear, honest and above board, that aims to understand the various needs and requirements of its clients and bring them to fruition.

Plutus was founded with this vision and will continue to strive to complete and share this mission with all its clients and stakeholders.



Resurgent India is a growing Investment Bank and a SEBI registered Category I Merchant Bank and a certified company under ISO 9001:2008, that offers services in the lines of Mergers & Acquisitions, Private Equity, Debt Solutions, Structured Finance, Capital Market Solutions, Transaction Advisory, Valuations, Enterprise Risk and Tax Services, Training etc.

USD 5 Billion

Worth successful transactions in advisory Role since 2005

70 + Published Research Papers

Guiding leaders in a better understanding of the continuously evolving global economy

350 + Successful Transactions

Helping industry sectors in achieving a sustainable growth in the era of financial globalization

Business partners in Europe, US, Middle East, Africa and Australia

Actively running several cross border and domestic transactions in sectors like Logistics, Consumer Goods, Agri, Packaging, Auto, Healthcare, Real Estate, Renewable Energy, Infra etc.

Other Group Companies



A leading analytics software company, helping MSME businesses make better decisions that drive higher levels of growth, profitability and customer satisfaction.

EasemyLOAN

A fintech start-up of Resurgent India Limited that provides online and offline retail loan advisory and execution services to individual and corporates.



A Resurgent Group Company

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