



FINANCIAL SOLUTIONS PVT. LTD.  
SEBI REGISTERED INVESTMENT ADVISER

# ASCENT TO PROSPERITY

NAVIGATE.ELEVATE.EMPOWER

---

## NEWSLETTER

MARCH 2024



# TABLE OF CONTENT

Unveiling Financial Horizons: A Recap of Ascent to Prosperity	3
Prakash Lohana: Keynote	4
Chintan Haria: Behind the Scenes: A Day at the Fund Manager's Desk	5
Kalpen Parekh: Decoding Investor Psychology	6
Nilesh Shah: India's Growth Story: A Balanced Perspective	7
Deepak Sharma: From Ideas to Impact: The Start-up Ecosystem in India	8
Radhika Gupta: Youngistaan	9
Vote of thanks	10

---

# Unveiling Financial Horizons:

## A Recap of Ascent to Prosperity

The **Ascent to Prosperity** event concluded on 10th March 2024 in Vadodara was a powerhouse of financial expertise, featuring prominent figures like **Mr. Kalpen Parekh, Mr. Prakash Lohana, Mr. Chintan Haria, Mr. Nilesh Shah, Mr. Deepak Sharma, and Mrs. Radhika Gupta**. Each expert delved into vital financial themes, offering their unique perspectives. From the dynamics of mutual funds to the entrepreneurial zest within startup cultures, and harnessing the economic potential of India's youth, the symposium was a blend of knowledge-sharing and strategic foresight aimed at nurturing a mindset geared towards sustained wealth generation.

---



# Prakash Lohana: Keynote

---



## **Mr. Prakash Lohana**

Managing Director

Ascent Financial Solutions Pvt. Ltd.

Certified Financial Planner (CFP) from  
Financial Planning Standard Boards of India

In an engaging session, Mr. Prakash Lohana demystified the intricacies of investment strategies, emphasizing the significance of understanding market trends and investor psychology. He articulated how behavioral finance plays a pivotal role in investment decisions, advocating for a balanced approach towards risk and return. Mr. Prakash Lohana's insights into the evolving landscape of investments, from traditional assets to emerging opportunities in digital currencies and technology-driven sectors, provided attendees with a comprehensive outlook on building a resilient and diversified investment portfolio for sustainable growth.



# Chintan Haria:

## Behind the Scenes: A Day at the Fund Manager's Desk



### **Chintan Haria**

Principal—Investment Strategy  
ICICI Prudential Asset  
Management Company Ltd.

Mr. Chintan Haria shared his profound insights on the importance of financial literacy and planning for long-term prosperity. He highlighted the critical role of informed decision-making in managing personal finances, urging the audience to embrace a disciplined saving habit and the power of compounding. Mr. Chintan Haria's session was a call to action for individuals to actively engage in their financial journey, emphasizing the need for a strategic approach to investment, tailored to one's risk appetite and life goals.



# Kalpen Parekh: Decoding Investor Psychology



**Kalpen Parekh**  
Managing Director & CEO,  
DSP Asset Managers Pvt. Ltd.



Mr. Kalpen Parekh captivated the audience with his expertise on smart investment strategies, underscoring the significance of understanding market dynamics and the need for diversification in one's investment portfolio. He passionately advocated for a balanced approach, combining risk management with growth opportunities to maximize returns. Mr. Kalpen Parekh's session was not just informative but also empowering, encouraging individuals to take control of their financial futures through educated and strategic investment choices.

# Nilesh Shah:

## India's Growth Story: A Balanced Perspective



### **Nilesh Shah**

Group President & Managing Director,  
Kotak Mahindra Asset  
Management Company (KMAMC).

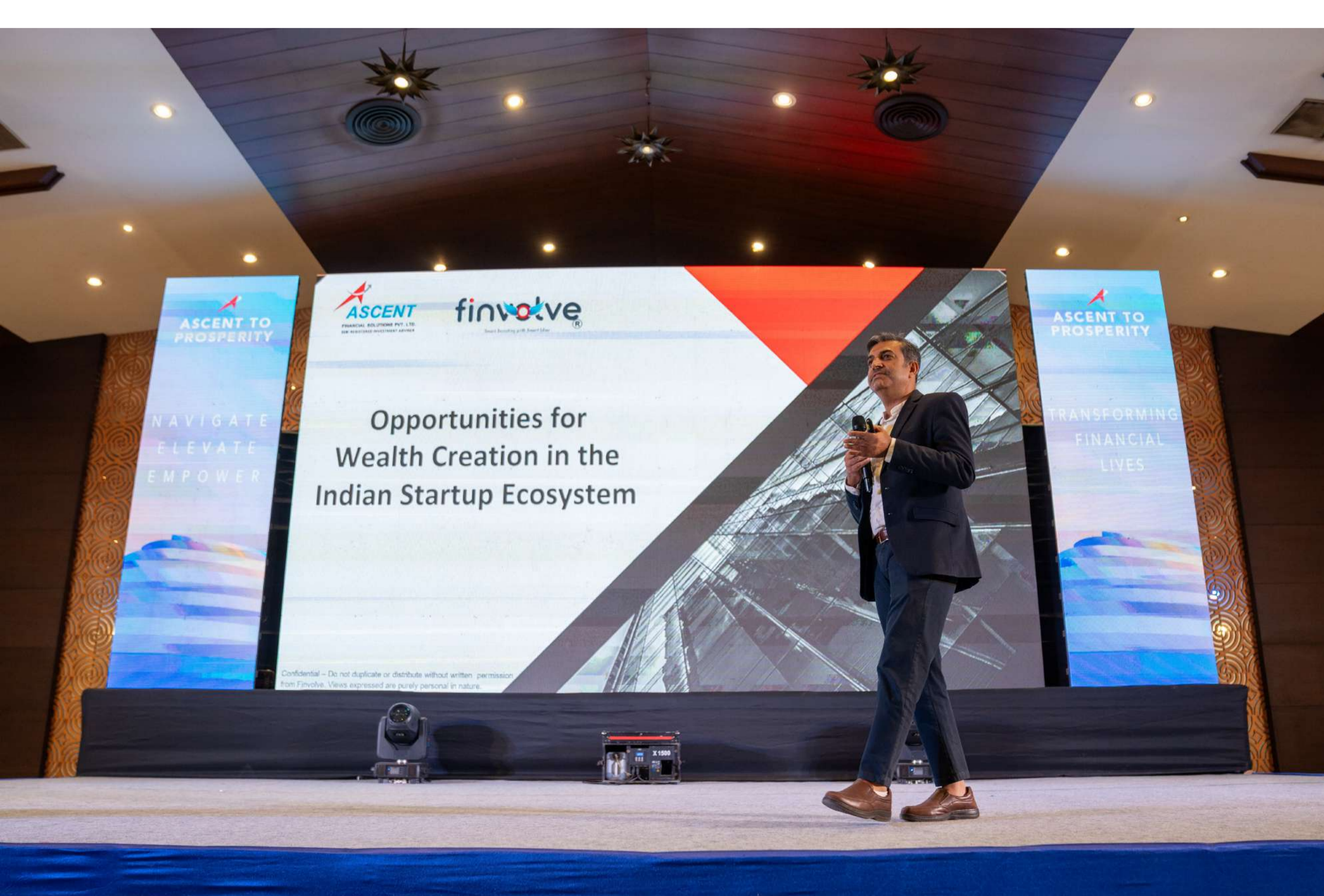
In Mr. Nilesh Shah's session, he delivered a compelling narrative on India's economic trajectory, emphasizing a balanced perspective on growth opportunities and challenges ahead. He artfully dissected India's potential in the global arena, backed by robust economic indicators and market dynamics, while also cautioning about the hurdles in sustaining this growth. Mr. Nilesh Shah's analysis offered a roadmap for leveraging India's burgeoning economy, making it a must-hear for those looking to understand and invest in India's future.



# Deepak Sharma: From Ideas to Impact: The Start-up Ecosystem in India



**Deepak Sharma**  
Cofounder & Manager Partner,  
India Accelerator.



Mr. Deepak Sharma's session illuminated the transformative potential of startups in India's evolving economic landscape. He explored the intricacies of the startup ecosystem, emphasizing the unique opportunities it presents for wealth creation and innovation. Mr. Deepak Sharma's insights into navigating the startup investment space, particularly through early engagement and strategic risk management, offered invaluable guidance for those looking to invest or participate in India's vibrant startup culture. His perspective is a beacon for aspiring entrepreneurs and investors alike.



# Radhika Gupta: Youngistaan



**Radhika Gupta**  
Managing Director & CEO  
Edelweiss Asset  
Management Limited.

In her compelling session, Mrs. Radhika Gupta highlighted the pivotal role of India's youth in shaping the nation's destiny. With insights drawn from her experiences, including the Shark Tank platform, Mrs. Radhika Gupta emphasized the importance of nurturing young minds and their innovative ideas. Her message underscored the transformative power of embracing change and fostering a culture of creativity and risk-taking. Her vision for empowering the younger generation serves as an inspirational call to action, advocating for a future where young innovators lead India towards unprecedented growth and prosperity.



# Vote of thanks

As we conclude this insightful journey, we extend our heartfelt thanks to you, our esteemed readers, for joining us in exploring the rich tapestry of ideas and visions shared by our distinguished speakers. Your engagement and curiosity are the true catalysts for change and growth. We are grateful for the opportunity to share valuable insights and hope they inspire you to new heights. Together, we look forward to building a brighter, more prosperous future. Thank you for being an integral part of this enlightening experience



# ASCENT TO PROSPERITY

N A V I G A T E . E L E V A T E . E M P O W E R

Contact us

[www.ascentsolutions.in](http://www.ascentsolutions.in)