

JOSH

A quarterly magazine by Swastika Investmart Ltd.

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Wealth ka. महाकुम्भ 2.0



www.swastika.co.in

Message from our leaders

As we close another remarkable year, I extend my heartfelt appreciation to every team member for your dedication and performance. Together, we have achieved strong growth across all verticals, reflecting our commitment to excellence and client trust.

Looking ahead to FY 2026–27, our vision is clear—scale with sustainability, strengthen our technology backbone, and deepen client relationships. We aim to build a future-ready organization driven by innovation, data, and disciplined execution.

Let us continue to push boundaries, embrace change, and work as one unified team to create greater value for our clients and stakeholders. The best is yet to come.

“Together we grew;
now we scale higher.”



Sunil Nyati, Founder & Managing Director

Message from our leaders

This financial year 2025-26 reflects the power of focused execution, with our teams successfully delivering on most of our key targets. Our planning cycle has helped us set bold and ambitious goals for the year ahead.

With a clear strategy and a committed team, we are fully prepared to take Swastika to the next level in the coming financial year.

"Clear strategy. Committed team. Bigger growth ahead."



Parth Nyati, CEO

Broking Business Vision 2026-27

₹120 Cr

► Revenue

₹21 Cr

► PAT

Message from our leaders

As we enter a new financial year, our focus is on building a resilient, top-tier financial services company powered by user-friendly technology. We are investing to empower clients and become India's most trusted fintech stockbroking and wealth management firm. Our priority is sustainable growth for both the company and our clients' wealth.

I encourage each of you to act as owners of your functions—streamlining processes and strengthening a culture of compliance with customer-first values. Despite geopolitical challenges that may impact our industry, together we will turn them into opportunities and set new benchmarks, enabling financial freedom for every stakeholder.



"Financial growth through innovation & trust" - Mahendra Sharma, Chief Financial Officer



The past few quarters have tested our customers' patience. Tax policy tremors, global uncertainty, and stubbornly poor returns have tried to shake conviction. Let them. We are not forged for gentle seasons. Our strength is discipline; our duty is standing up for the customer. If we hold fast to Swastika's values today, they will return to us as tomorrow's victories.

We shall prepare relentlessly, persist fearlessly, and execute with quiet resolve. When the tide turns, as it always does, we shall not merely endure, we shall rise and prevail.

As the Bhagavad Gita reminds us-

कर्मण्येवाधिकारस्ते मा फलेषु कदाचन।
मा कर्मफलहेतुर्भूर्मा ते सङ्गोऽस्त्वकर्मणि॥

"Through uncertainty, we stand strong." - Sameer Lodha, Chief Growth Officer

Expanding Horizons: Strengthening. Our Franchise Network and Wealth Ecosystem. This financial year marks a key milestone with the onboarding of ~100 franchise partners, strengthening our distribution network and partner trust. Looking ahead to FY 2026–27, we aim to expand to 500 partners, supported by a structured roadmap and dedicated Business Development Managers across major states. Alongside expansion, we are focused on diversifying sub-broker businesses into wealth management. A key priority is the Mutual Fund segment, with a target of ₹100 crore AUM.

Our goal is to build a scalable, future-ready ecosystem that enables sustainable growth, strengthens partnerships, and delivers long-term value to clients.



"Growth in numbers, strength in partnerships." - Saurabh Nuwal, Chief Partnership Officer

Message from our leaders

Our vision for 2026-27 has two clear parts.
One for our team. One for our clients.

For our team, we want to build a high trust culture.
Trust will come from small daily actions.
We will focus on ownership, honesty, and clear communication.

For our clients, we want to accelerate growth in a meaningful way.
We will improve customer acquisition and make it more efficient. We will deepen engagement with our existing users.
We aim to be known for high-conviction, actionable research.
More clients should actively trade based on our insights.

We will build trader-first features.
We will make Sarthi a strong real-time companion.

If we get both right, Swastika will grow faster, stronger, and with trust at its core.



Harshit Rungta, Chief Product Officer

Devashish Nyati, Chief Technology Officer

As we step into 2026–27, our vision is to position Avisa as a trusted, future-ready wealth partner—deepening client engagement while guiding disciplined, long-term wealth creation. In a volatile global environment, we remain anchored to research-driven insights, prudent asset allocation, and a long-term approach.

We aim to expand into the Ultra HNI segment through sophisticated family office solutions, offering integrated expertise across investments, tax, risk, alternatives, and legacy planning. Backed by India's strong economic fundamentals, we are confident in long-term opportunities.

We will also empower our partners to grow AUM, strengthen relationships, and become trusted advisors-building enduring trust and sustainable value for all stakeholders.



Vinit Rathi, CEO, Avisa Wealth

Aditya Agrawal, CIO, Avisa Wealth

Vision 2026-27

CENTRALIZED BUSINESS

▶ Gross Revenue	₹30 Cr	▶ No. of Leads	2.5 L
▶ New Broking AUM	₹110 Cr	▶ New Clients	60 K
▶ New Sarthi Activations	40 K	▶ New ₹30 K Funded Accounts	17 K
▶ New MF AUM	₹30 Cr	▶ CAC (₹30 K Funded)	₹4500
▶ Avisa Transactional Revenue	₹1 Cr		

DECENTRALIZED BUSINESS

▶ Gross Revenue	₹25 Cr	▶ Client Meetings	10 K
▶ New Broking AUM	₹80 Cr	▶ New Clients	3.5 K
▶ New MF AUM	₹40 Cr	▶ New ₹30 K Funded Accounts	1.2 K
▶ Avisa Transactional Revenue	₹75 L		



Vision 2026-27

PARTNERSHIPS

▶ Gross Revenue	₹65 Cr	▶ New APs	500
▶ New MF AUM	₹100 Cr	▶ New Clients	25 K
▶ Avisa Transactional Revenue	₹75 L		

INVESTMENT BANKING

6	₹12 Cr.
▶ IPO/PE Deal	▶ REVENUE



FY 2025-26 Avisa's Journey

Numbers that make us proud

58%

Mutual Funds
AUM growth

129%

SIP
book size

33%

Increase in Mutual Fund
Clients with Avisa

₹2.5 Cr.

Highest Ticket Size
in Mutual Funds



282%

Insurance Premium
Growth

₹33 Cr.

Unlisted Shares
Turnover FY 25-26

1500

Clients Onboarded for
Unlisted Shares



With Avisa Wealth's guidance, the relationship evolved into a milestone ₹2.5 crore mutual fund investment, aligned with the client's goals using a core-satellite strategy.
-Manmohan Sharma & Suraj Raghuwanshi, Indore



Grateful to Parth Sir, Neha Ma'am, Kapil Sir, and Kamlesh for the opportunity and support.



Investing with Avisa Wealth has been reassuring, thanks to their proactive, client-focused approach. I shifted ₹1.5 crore AUM in Dec 2025 and look forward to growing my portfolio with them. -Kamal Keshwani, Indore

With AVISA Team's guidance, we've achieved a ₹4 crore AUM transfer and aim to reach ₹100 crore in 5 years across Mutual Funds, Broking, and Wealth.
-Harshil Kachhadiya, Mumbai



Vision board FY 2026-27



₹200 Cr.

Mutual Funds
AUM



10K

Wealth
Clients



₹40 Cr.

FD/Bonds
AUM



₹60 Cr.

Unlisted Shares Turnover
(Share -> Shares)



₹2 Cr.

Insurance
Premium



₹10 Cr.

PMS AUM



Events At A Glance

Hackathon - Swastecha 3.0



Team FINNIFTY



Team BANKNIFTY

Winners

Big Budget Days



Big Budget Days in action, we decoded the Union Budget in real time.

Women's Day



Graceful appearance of lovely ladies on Women's Day

Swastika Premiere League

A green cricket tournament



Winning team: SENSEX Superstars



Runner-up team: Equity Strikers



Winning Women's team: Pink Panthers



Player of the Tournament & Best Batter: Pravesh Gour

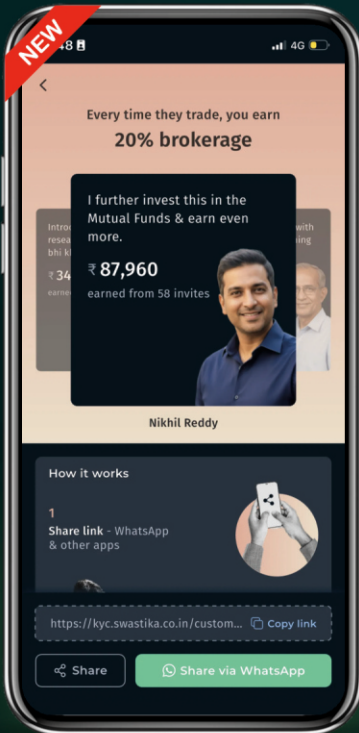


We used steel bottles

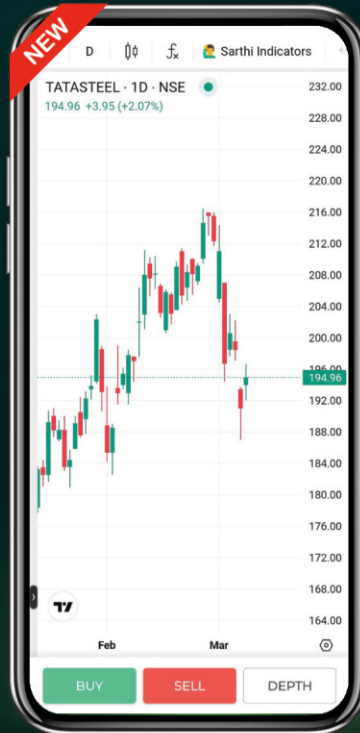


Tech Updates

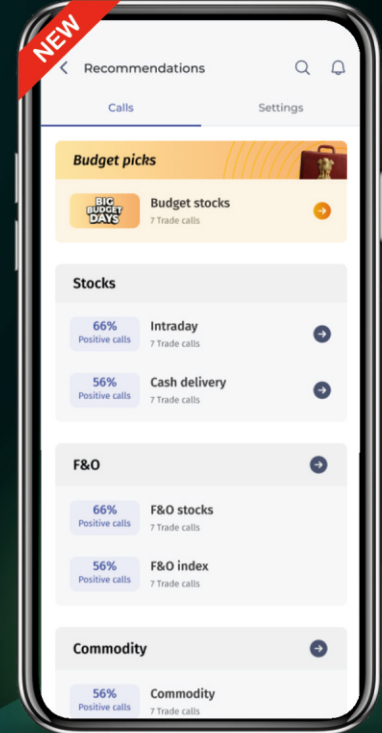
Client referral dashboard and link sharing



Ultra fast charts with tick by tick data



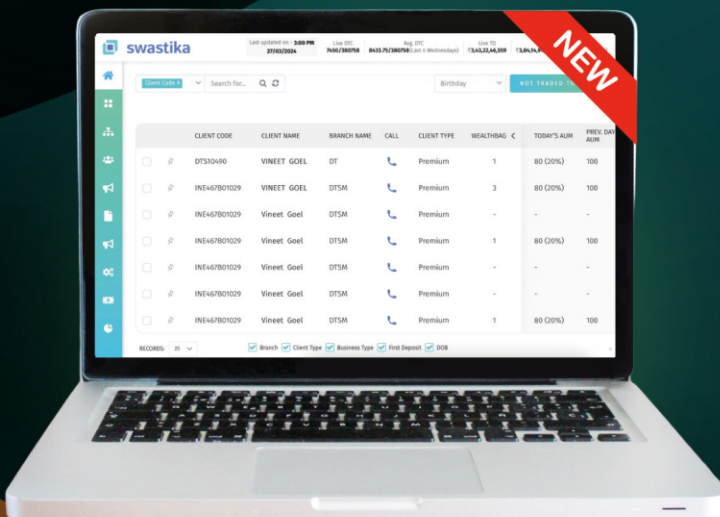
Big budget days and internal recommendations screen



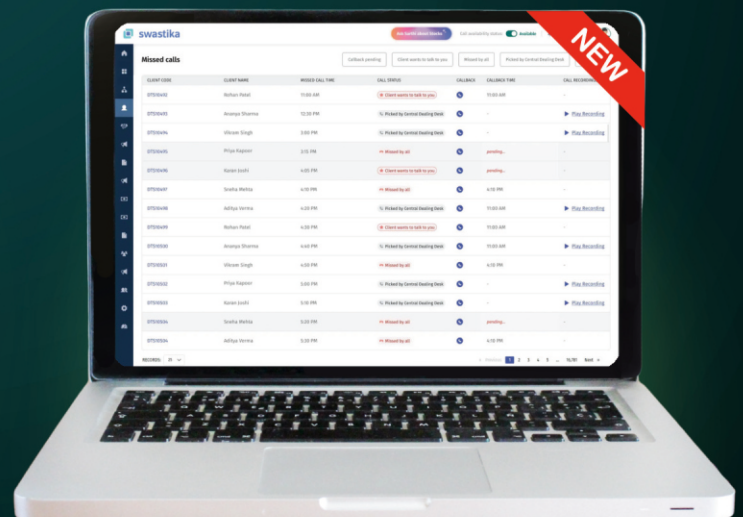
COMING SOON

- Mutual Fund
- Dashboard Revamping
- Screeners
- Financial News and Corporate Actions

Wealthbag details in Jarvis



Missed call dashboard



* **Swastika** is
Ready to *Shine*

Swastika is gearing up for a **grand entry** on **TV** and **digital** platforms with a high-impact campaign. Crafted by a renowned ad agency based in Mumbai, our innovative '**Sarathi**' is set to **shine**, create a strong buzz, and reach every home as a popular and trusted name!

Sarathi SAHI OPPORTUNITY CHUNN. 



Shifted 13 Branches to Smarter Coworking Spaces



13 branches have been successfully shifted from traditional office setups to coworking spaces.

- Bengaluru
- Chennai
- Hyderabad
- Jalandhar
- Kanpur
- Kolkata
- Ludhiana
- Nagpur
- Patna
- Raipur
- Surat
- Vijayawada
- Visakhapatnam (Vizag)



Top Performer Authorised Persons



Rita Himanshu
Shah
Ahmedabad



Safal Finstock
Pvt. Ltd.
Ahmedabad



Bharat Kumar
Barmer



Monita Melana
Bhilwara



Harshil Suresh
Kachhdiya
Borivali



Shubham
Hisar



BKM Share
Brokers Pvt. Ltd.
Indore



Divya Jain
Indore



Madia Investmart
Indore



Prince Hamraj Birla
Indore



Rohit Sonkar
Indore



Shubham Joshi
Indore



Vivek Savita
Indore



Kanha Stocks
Jaipur



Tejas Invesco
Jaipur



Saroj Dangi
Mumbai



Sureja Stock
Broking Ltd.
Rajkot



Zalak Chetankumar
Kotak
Rajkot



Kamini Sharma
Sehore



VR Associates
Sehore

AND THE HAPPINESS CONTINUES...

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Swastika Investmart Ltd.**



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