



www.eleveight.in

A new-age consulting & research firm that is focused on

End to End Strategy + Action

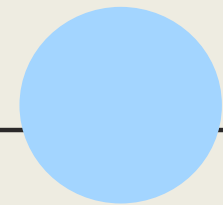


Our expertise

HUMAN INPUT

CREATIVITY

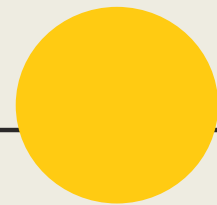
TECHNOLOGY
INTERVENTION



01

BUSINESS
STRATEGY

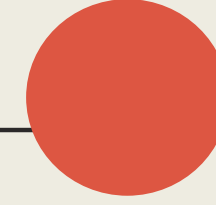
We create strategy for
your sustainable growth



02

PRIMARY & SECONDARY
RESEARCH

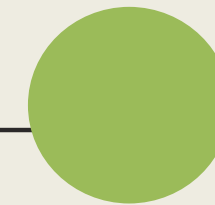
We conduct in-depth study
& analysis



03

CONTENT
CREATION

We implement content
research / strategy



04

DIGITIZATION/
AUTOMATION

We automate repetitive
manual processes

←→ **STRATEGY** ←→

←→ **ACTION** ←→

Our role

GREAT STRATEGY

- In-depth research
- Domain experts
- Cross-industry experience
- Outside-in perspective
- Innovation and out of box thinking

SCALABLE EXECUTION

- Professional project management
- One source of truth
- Multiple resources (creative, content, technical, social media)
- Clear responsibility and accountability

We provide end to end services from building the right strategy to managing the execution (PM)

Our Execution Model (ACE)

Readiness Assessment

Our *proprietary assessments and questionnaires* will ensure that we have all the relevant information for strong strategy & stronger action

Project Management

ACTION is at the core of our business values. Whatever we strategize, we deliver together.

A

ACCESS

Build the strategy

C

We are here to collaborate with you and bring across **expertise** to help you achieve your business goals faster. We work as your **extended team**.

E

EXECUTE



MEET THE TEAM



Expertise : Investment and Market Research, Content Writing, Content strategy, Financial Journalism

Deepika has over 18 yrs experience in financial markets across a variety of verticals including equity sales, derivatives sales, derivatives research, and macro research. She has worked in leadership roles at India's leading financial institutions. Her last corporate employer was D.E. Shaw India.



Expertise : Project management, Market Research, Content Marketing, Brand strategy

Upasana has more than a decade of experience in research, strategy and business consulting. She was heading strategy for large corporates like Nippon Life Asset Management prior to starting her entrepreneurial journey. She is also a director with a financial education company FinX.

Our Clients



SUNDARAM ALTERNATES
UNEARTHING OPPORTUNITIES

Cipla

 SOULFLOWER



BNP PARIBAS



Julius Bär



Our services in a nutshell



01

BUSINESS
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We create strategy for
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1 STRATEGY CONSULTING

NEW BUSINESS STRATEGY

Feasibility study, market **research**

Creating **MVP** (Minimum viable proposition) & Most efficient **ToM** (Target operating model)

Rapid **prototyping**

Creating **business plans**

Brands involved

 Union
Mutual Fund

 RICH'S

 CORNHILL
MANAGEMENT

 MULTI-ACT

GROWTH STRATEGY

Visibility, & content strategy to accelerate business growth

Communication strategy for customer/distributor acquisition, activation and retention

Expansion plan across geography / product / partnership, etc.

Our Services in a nutshell

HUMAN INPUT

CREATIVITY

TECHNOLOGY
INTERVENTION

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We conduct in-depth study
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manual processes

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CONTENT CREATION

We implement content
research/strategy

2 PRIMARY & SECONDARY RESEARCH

COMPETITION ASSESSMENT

Competition benchmarking across products / markets / assets, etc.

Assessment of digital assets in alignment with overall strategy

Assessment of consumer stickiness and its impact on business and brand

Brands involved



Cipla



OPPORTUNITY ASSESSMENT

Detailed **market study** to identify gaps and opportunities

Understanding the market size and **consumer experience**

Growth assessment across markets / product / etc.

2 PRIMARY & SECONDARY RESEARCH

ACROSS THE FUNNEL APPROACH
to leverage detailed information to take a informed decision

Internal data

Internal team
 Geographical study
 Customer History
 Product trends
 Channel
 Competition

External Data

Industry study
 Geographical trends
 Online & Offline
 Channels
 Competition Analysis

Gain Audience Insights



Segment Audience



Build Personas



Understand Differences

Audience Segments



Audience Targeting

Our Services in a nutshell

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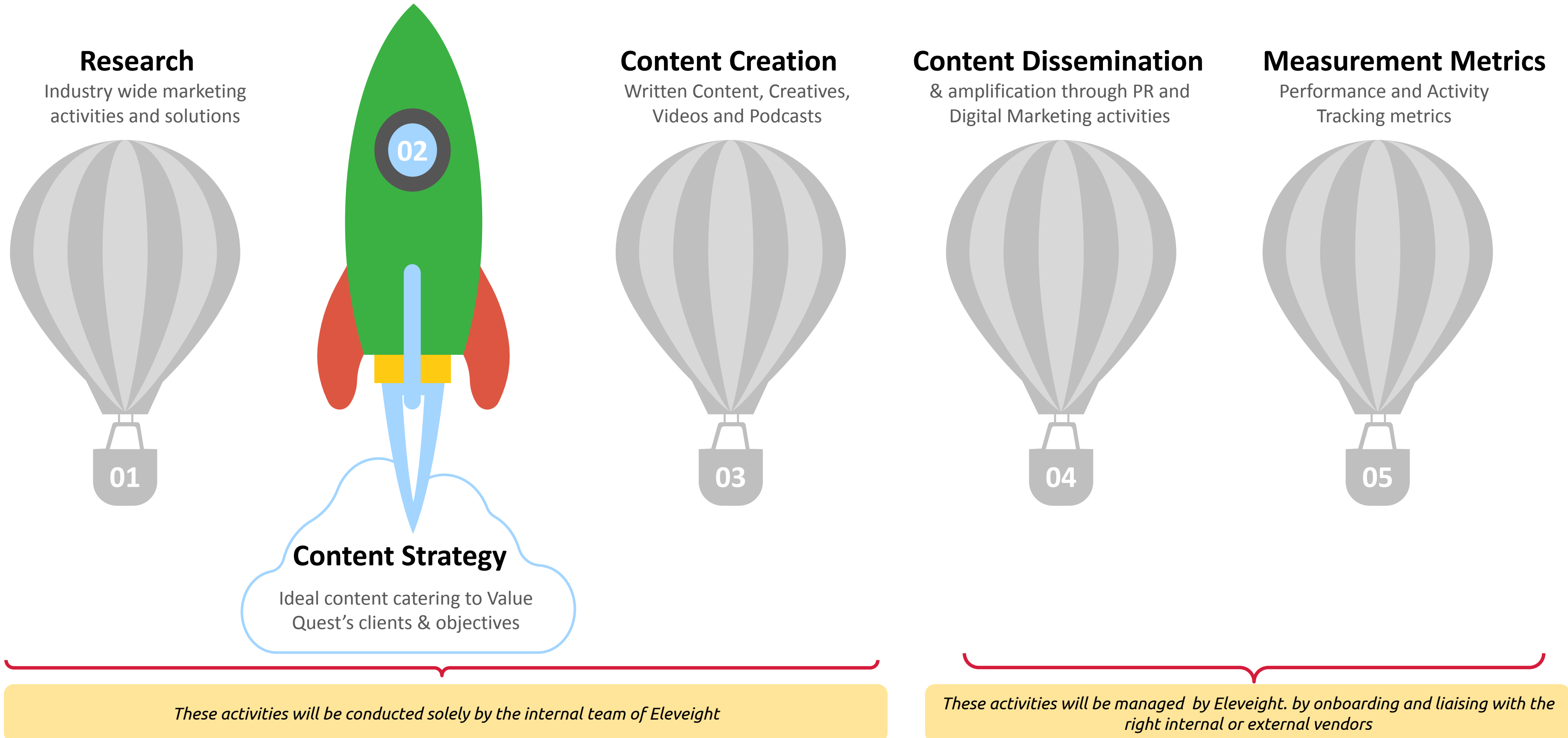
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Content strategy & Execution




OUR WORK




High impact visibility properties





VENTURE DEBT

Bridging the gap between equity rounds



Anand Lalla
Head - Domestic Institutional Business

Alternative investments are fast gaining traction as an increasing number of HNI and UHNI customers gravitate towards the Alternative Investment Fund (AIF) vehicle. Their ascent to popularity can be attributed to their ability to generate potentially enhanced risk adjusted returns, offer improved portfolio diversification, and provide nuanced exposure to unique investment strategies and themes. One such unique offering under the AIF umbrella is Venture Debt Funds or VDFs. These fall under the purview of CAT II AIFs and are focused on venture debt. In the recent past, venture debt has become more visible as the amount disbursed has seen a sharp uptick increasing from USD 281 Mn in 2019 to USD 538 Mn in 2021¹.

Venture debt is simply a form of debt financing that is typically extended to venture capital (VC) backed businesses. Venture debt is usually offered to companies that have already successfully completed several rounds of venture capital equity fundraisings. These are typically companies that have some history of operations but still do not have sufficient positive cash flows to be eligible to obtain a more conventional loan. The financing is in the form of a non-convertible, senior secured loan and is offered to companies that show potential to grow, not necessarily have cash flows or collateral, but are backed by VC's. For the company, venture debt can be a powerful strategic tool that complements its equity financing. Correspondingly, it can also engender several other benefits including:

- ✓ Protecting equity dilution by enabling access to lower cost debt capital
- ✓ Bridging the gap between equity funding rounds
- ✓ Financing the working capital requirements of rapidly growing businesses

- ✓ Financing capital requirements, especially in the case of companies that are unable to easily access bank financing
- ✓ Creating a credit track record in the early stage by deploying a healthy capital mix of debt and equity financing

Structuring Venture Debt

The underlying instrument in venture debt is a "non-convertible debenture" (NCD). These NCDs are coupon bearing instruments that are issued by the borrower, i.e., the company in need of the debt to the lender, i.e., the venture firm or fund. In addition to NCDs, the lender may also subscribe to equity warrants of the borrower. These warrants act as a security as they give the holder, i.e., the lender, the right but not the obligation to subscribe to equity of the company at a certain price within a specific period of time. Thus, for investors, VDFs can be an interesting investment choice as they provide relatively higher coupon based cash flows along with a certain degree of protection.

It is well-known that for businesses, equity is the most expensive source of financing. Thus, it becomes important for entrepreneurs to strike an even balance between equity and debt financing. Inarguably, in the early stages, when entrepreneurs are yet to establish a viable revenue model, equity capital becomes the primary external source of capital. However, as the company begins to expand and correspondingly require additional capital to scale up, debt financing, especially via the venture debt route, can be a compelling option.

¹ <https://s3.ap-south-1.amazonaws.com/www.strideventures.in/Stride+Ventures+India+Debt+Report+2022.pdf>

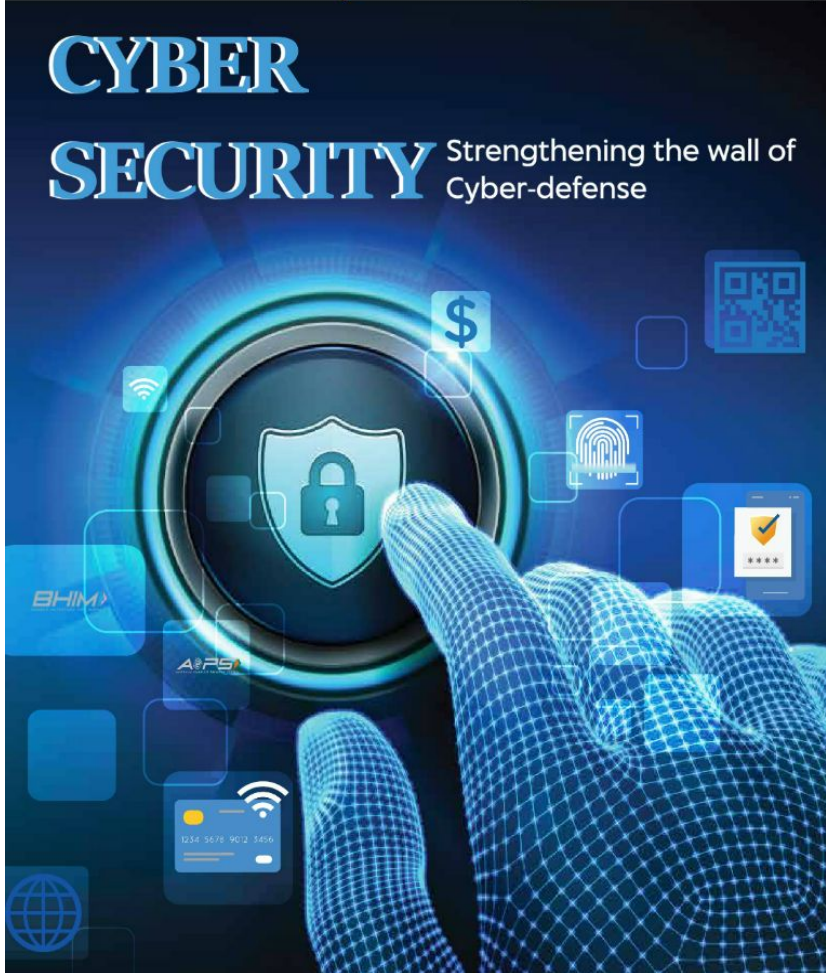


AGSTTL
NEWS

2021 - Volume II

CYBER SECURITY

Strengthening the wall of Cyber-defense





Energy transition & a global march towards Net Zero

"I believe the decarbonizing of the global economy is going to create the greatest investment opportunity of our lifetime. It will also leave behind the companies that don't adapt, regardless of what industry they are in. And just as some companies risk being left behind, so do cities and countries that don't plan for the future", boldly proclaims Blackrock's chief Larry Fink in his 2022 Annual Letter to CEOs.¹ The evidence of these profound words echoes around us. Today, electric cars cruise highways that abut massive plains dotted with wind turbines. A birds eye view of many cityscapes with rooftops lined with solar panels. And more importantly, the chatter around climate and sustainability is only growing louder.

Climate change has metamorphosed into one the biggest challenges of the 21st century and the fact that it is potentially an existential crisis has been accepted by a large number of people across the globe. Thus, today, there is an urgency to imbue sustainable practices at a country, company, and individual level and accelerate the transition to a low-carbon economy.

Inevitably, this period of transition is engendering interesting and value accretive investment opportunities. Commitments by both countries and companies, innovative technology, and funding are the three factors that are likely to fuel this transition and ensure that the world becomes at least carbon neutral over the next 3 decades. **Recognising this opportunity, global investment in the low-carbon energy transition is already increasing at a fast clip. As per BloombergNEF's report,² global investments in the low-carbon energy transition totalled USD 755 billion in 2021, up from USD 595 billion in 2020 and just USD 264 billion in 2011, thereby registering an almost 3x increase in a decade.** These investments were channelised towards different types of projects, including renewables, storage, charging infrastructure, hydrogen production, nuclear, recycling and Carbon Capture and Storage (CCS). They also comprised projects that were related to the end-user purchase of low carbon energy devices, such as small-scale solar systems, heat pumps, and zero-emission vehicles. Despite this, the transition to net zero will require significantly higher investments from here on. For example, to achieve the Paris climate goals, by 2025, 100 million Electric Vehicles (EVs) must be sold every year. To put this in the context of need, approximately 2 million EVs were sold in 2019.³ Inarguably, this implies considerable growth for EV manufacturers along with multiple other stakeholders in the EV ecosystem.

However, it is important to understand that this transition to a low carbon economy is in no way linear. Rather it is checkered with several challenges that make it imperative for investors to adopt a more nuanced approach while making investment decisions in this space. Thus, selection remains key.



¹ Larry Fink's Annual 2022 Letter to CEOs | BlackRock

² Energy-Transition-Investment-Trends-Exec-Summary-2022.pdf | bblhub.io

³ Investing in decarbonisation is a once-in-a-generation opportunity - Raconteur

Private market Opportunity for Family Offices

THE PRIVATE MARKET OPPORTUNITY



Private Investments

When people think of investments, they usually jump straight to publicly traded stocks that are listed on the stock exchange. This proclivity towards listed companies probably stems from the fact that they are somehow more 'visible'. However, with markets tending towards efficiency and the potential for alpha reducing, or at least becoming more challenging to identify, we are inevitably seeing a sharp shift towards private investing.

A new but enduring trend

Over the last few years, there has been a significant rise in the amount of money getting invested in the private markets. Traditionally, businesses, institutional investors, and private equity funds have held sway in the private investment market both globally as well as in India. However, more recently, family offices are beginning to actively participate in the private investment market and are slowly taking control of a larger piece of the AUM.

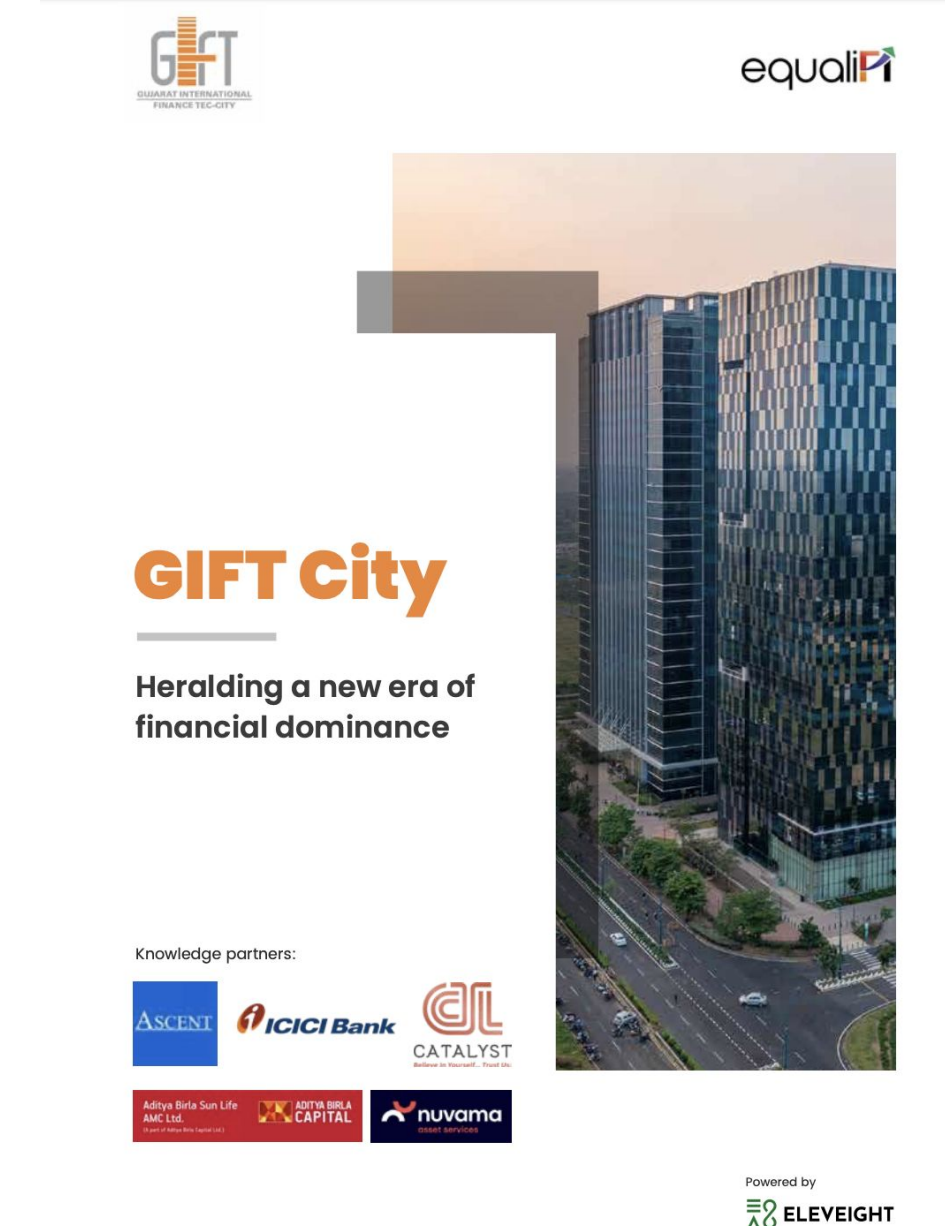
According to a report by EY, over 83% family offices have an allocation to private markets which is more than 10% of their overall asset distribution and over 40% family offices have doubled their allocation to private markets in the past 5 years. The report further observed that private market investments remain the alternative investment of choice with allocations to startups and VC funds comprising 18% of the overall pie. This is significant when compared to a 15% allocation to other alternatives, 20% allocated to fixed income, and 36% to listed equities.¹

¹ How family offices and UHNIs are allocating their private market investments in India (ey.com)

OUR WORK



Reports & Publications



[Case Study](#)

OUR WORK



Thought Leadership

Business Standard

Wealth Management | Global wealth | BS Opinion

Wealth Managers Must Sharpen Their Game

To truly capitalise on the market opportunity, wealth managers need to focus on quality of advice, innovation in product design and ease of execution.



By -
Bhupinder Singh
Founder and Group CEO - InCred

Published on:
12th September 2021 in Business Standard

InCred! Wealth

EQUANIMITY

Discover Venture Think Press Connect

Mar 16 | Written By Equanimity Investments

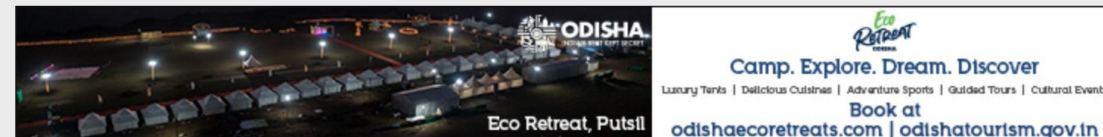
RetailTech : Making Shopping Hi-Tech

The average Indian consumer has grown beyond the ‘roti, kapda, makaan’ paradigm to become more demanding and discerning about consumption. Inarguably, Indian consumers drive a hard bargain and are highly cost conscious. However, in addition to compelling prices, consumers today also desire a great shopping experience,



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News > Columns

Risk—An enabler for the insurance industry?

Columns

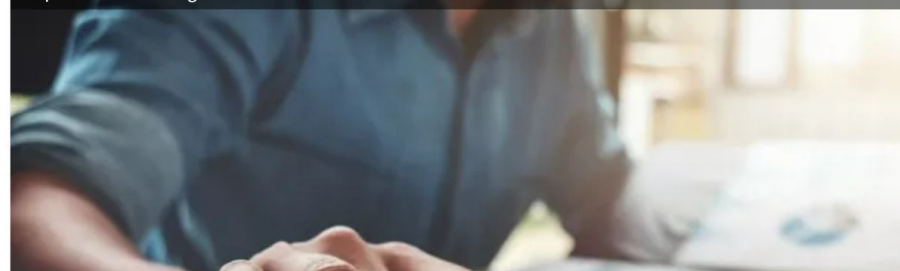


Rohit Mahajan | President, Risk Advisory, Deloitte India
Updated Nov 25, 2020 | 12:03 IST



Risk should be proactively treated as an opportunity to enable positive change. The current environment offers the insurance industry a chance to rethink and redesign existing strategies for the ‘new’ normal.

Representational image



Risk, even though undesired, is a reality which people and businesses face daily. However, we tend to be inherently reactive rather than proactive when it comes to risk management. Consequently, we view insurance as a cost rather than an investment that can potentially reap high dividends.

FORTUNE
INDIA

100 India 40 Under 40 Most Powerful Women Budget 2023 The Next 500 India's Rich

OPINION

Reimagine and thrive with Digital 2.0

Instead of using yesterday’s logic to resolve for future threats, companies should look at risk through a digital lens and proactively create policies to mitigate them in the future.

By **ROHIT MAHAJAN**, Apr 21, 2020 | 4 min read

Forbes ADVISOR

How To Build An Investment Portfolio



Hersh Shah, Aashika Jain
Contributor, Editor

Published: Mar 28, 2022, 8:47pm

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moneycontrol

BUDGET 2023
The New Normal

CO-PRESENTING PARTNER
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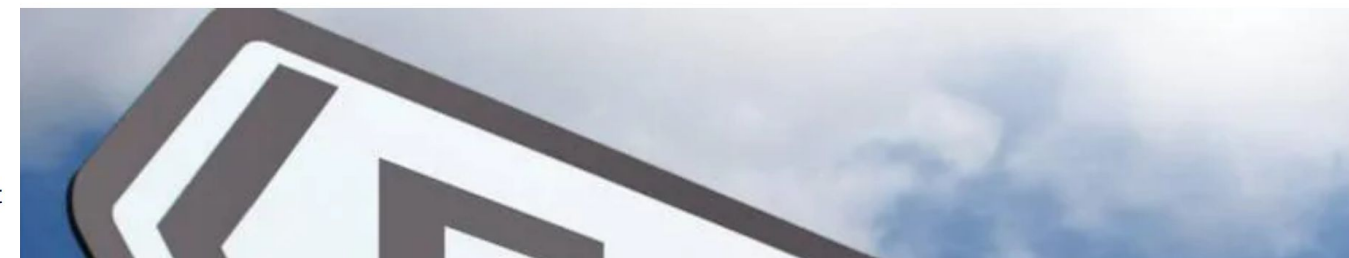
Attend Today : Nifty Banker 3.0 | India's First Retail Index Traders Online Conference. →

Home > News > Business > **MARKETS**

How to achieve optimum equity allocation in portfolio? Check these factors before investing

Most investors end up chasing current high-flyers instead of underperforming sectors. This, more often than not, results in sub-optimal terminal portfolio value. Shaji Kumar Devakar of IIFL Wealth explains how you can bypass this common mistake.

SHAJI KUMAR DEVAKAR | JULY 21, 2021 / 01:55 PM IST

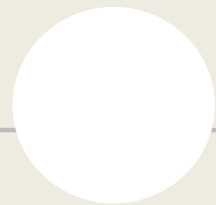


Our Services in a nutshell

HUMAN INPUT

CREATIVITY

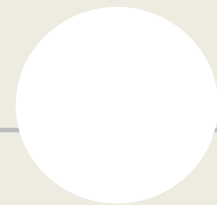
TECHNOLOGY
INTERVENTION



01

BUSINESS
STRATEGY

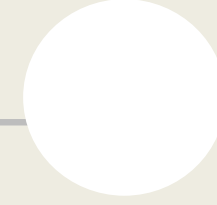
We create strategy for
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02

PRIMARY & SECONDARY
RESEARCH

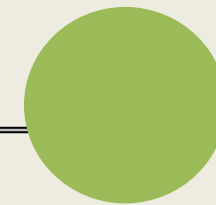
We conduct in-depth study
& analysis



03

CONTENT CREATION

We implement content
research/strategy



04

**DIGITISATION/
AUTOMATION**

We automate repetitive
manual processes

4

DIGITISATION/ AUTOMATION



WHAT WE DO

PROCESS OPTIMISATION

- Reworking on existing processes and redefining them to rescue time and cost

AUTOMATION

- Automation of repetitive tasks and processes to reduce manual effort
- Eliminate manual errors in data representation

ADOPTION

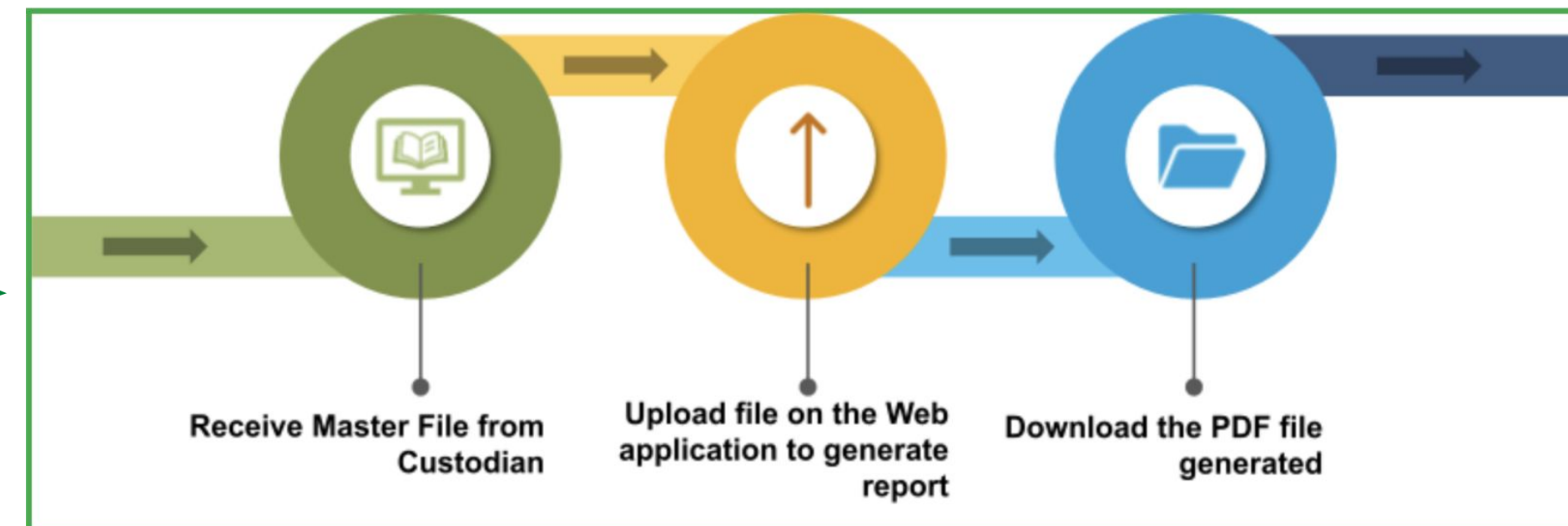
- Enabling adoption of digital initiatives by internal or external stakeholders/teams
- Establishing tracking and monitoring mechanisms to enable usage of platforms

4 OUR PRODUCT NOTE AUTOMATION TOOL

AS-IS-PROCESS



A 3 STEP 3 SECOND PROCESS



- Existing process of product note/presentation creation is cumbersome for all AMCs. Manual intervention causes errors and loss of valuable time
- Our automation tool requires a one-time set-up and can be utilised by the internal team to automate the product note creation process in **3 steps in 3 seconds**
- **Average expected cost saving from our tool = INR 6- 10 Lakh/year**



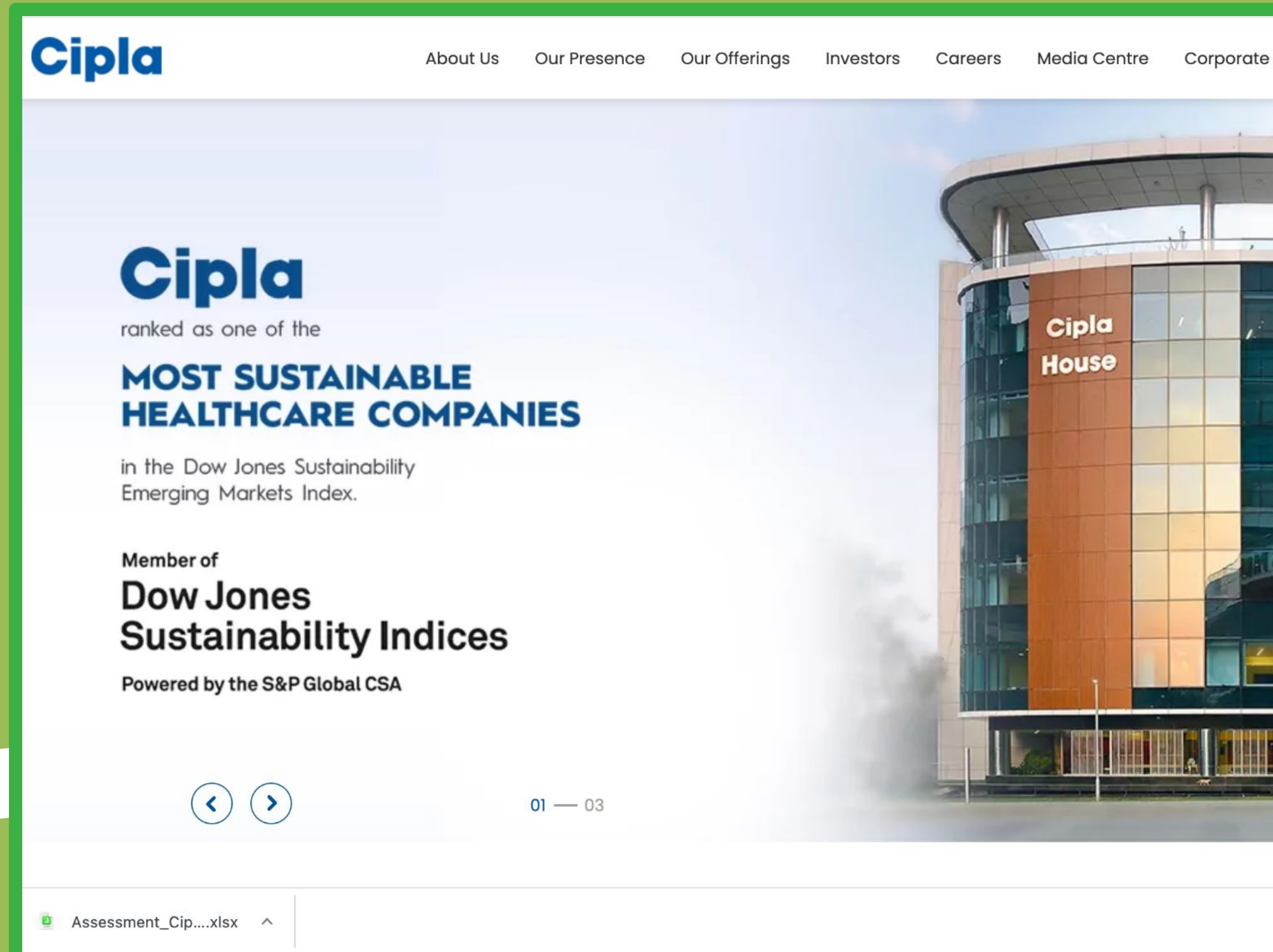
CASE STUDIES

Distributor & consumer experience

for a leading pharmaceutical
company

Objectives :

1. **Primary research** for client's stockists, chemists, end consumers to understand the challenges/improvement areas and misalignment with targeted customer experience
2. **Secondary research** to understand industry best practices
3. **Strategy** based on research insights including process improvement and standardisation



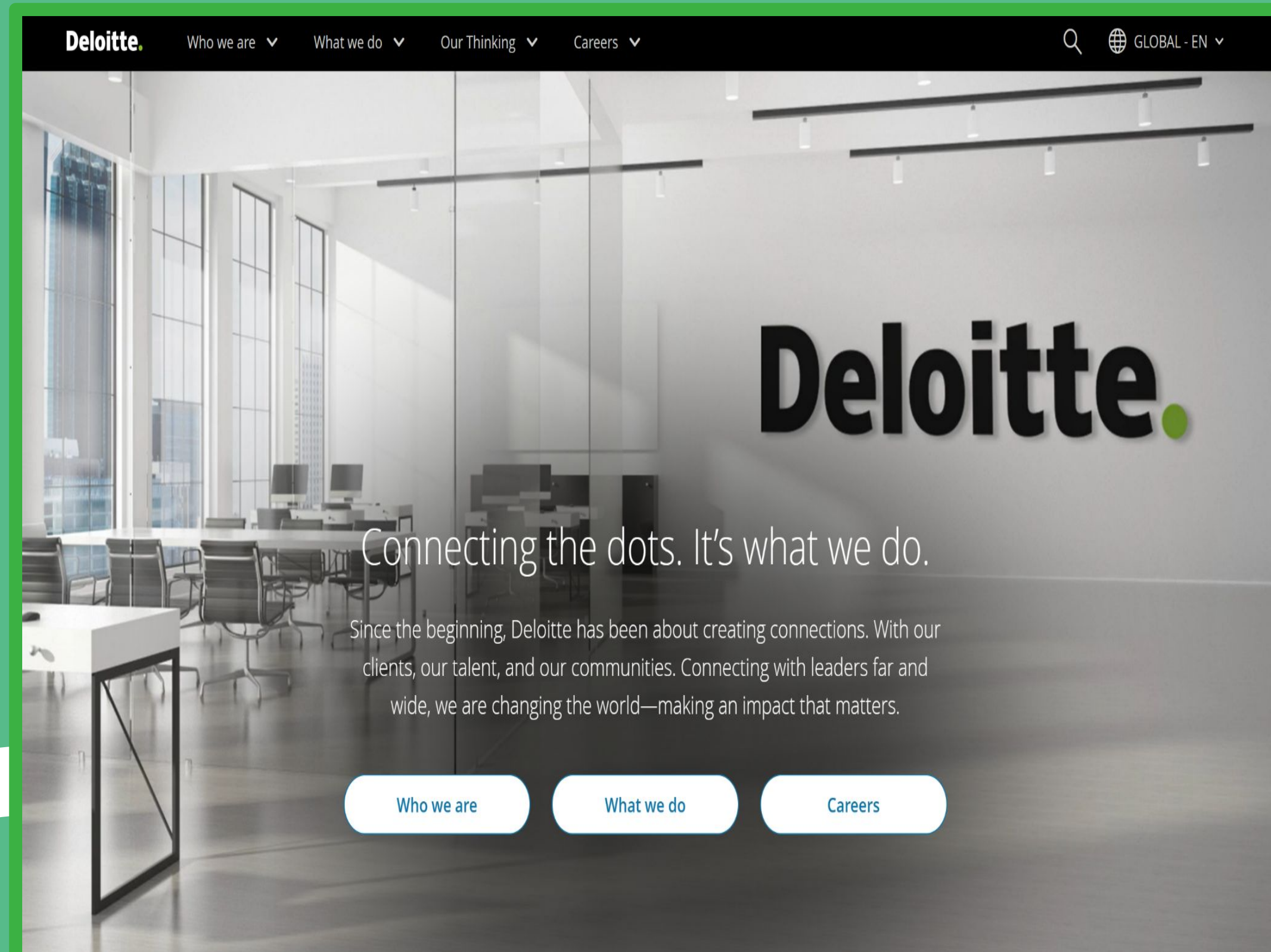
OUR WORK

Data analysis & recommendations

for an international auditing & consulting firm

Objectives:

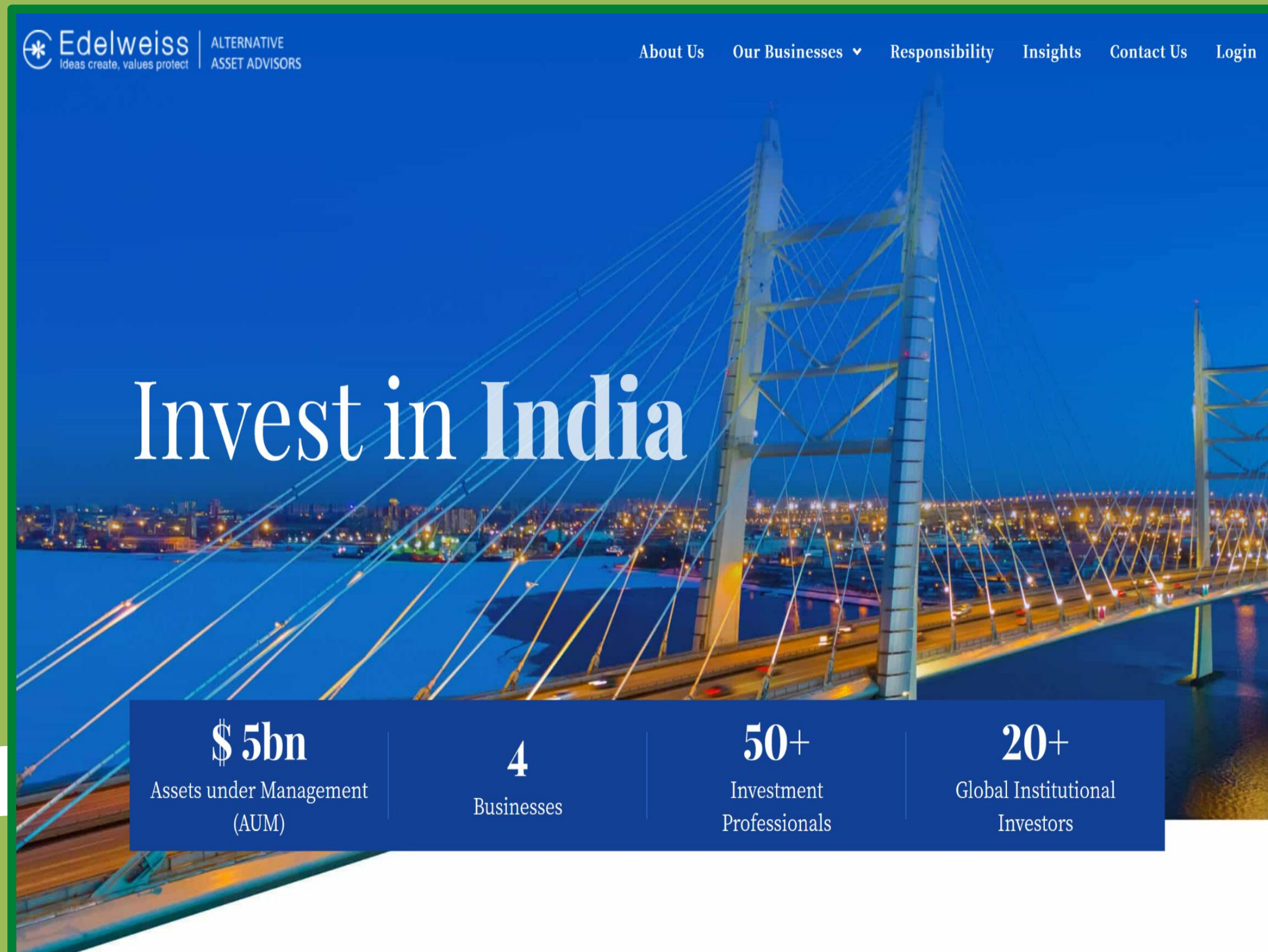
1. **Data analysis of survey conducted by the client** to analyse the impact of climate change on various factors, across the Asia-Pacific region
2. **Data segmentation** done to create multiple cuts to reflect climate change perception across locations
3. **Analysing** the perception towards sustainability in the Asia-Pacific region and the constraints towards implementing sustainable practices
4. **Preparing recommendations** to ensure the implementation of sustainable practices across various countries in the Asia-Pacific region



Employee survey, data analysis, and brand positioning for a leading BFSI company

Objectives:

1. **Primary research** for client's internal team to understand their perception of the brand and alignment with core values
2. **Secondary research** to understand competition brand positioning
3. **Branding strategy** based on analysis of internal employee insights, competition benchmarking, and the core values of the client
4. **Execution** of the strategy through the relevant product collaterals



OUR WORK

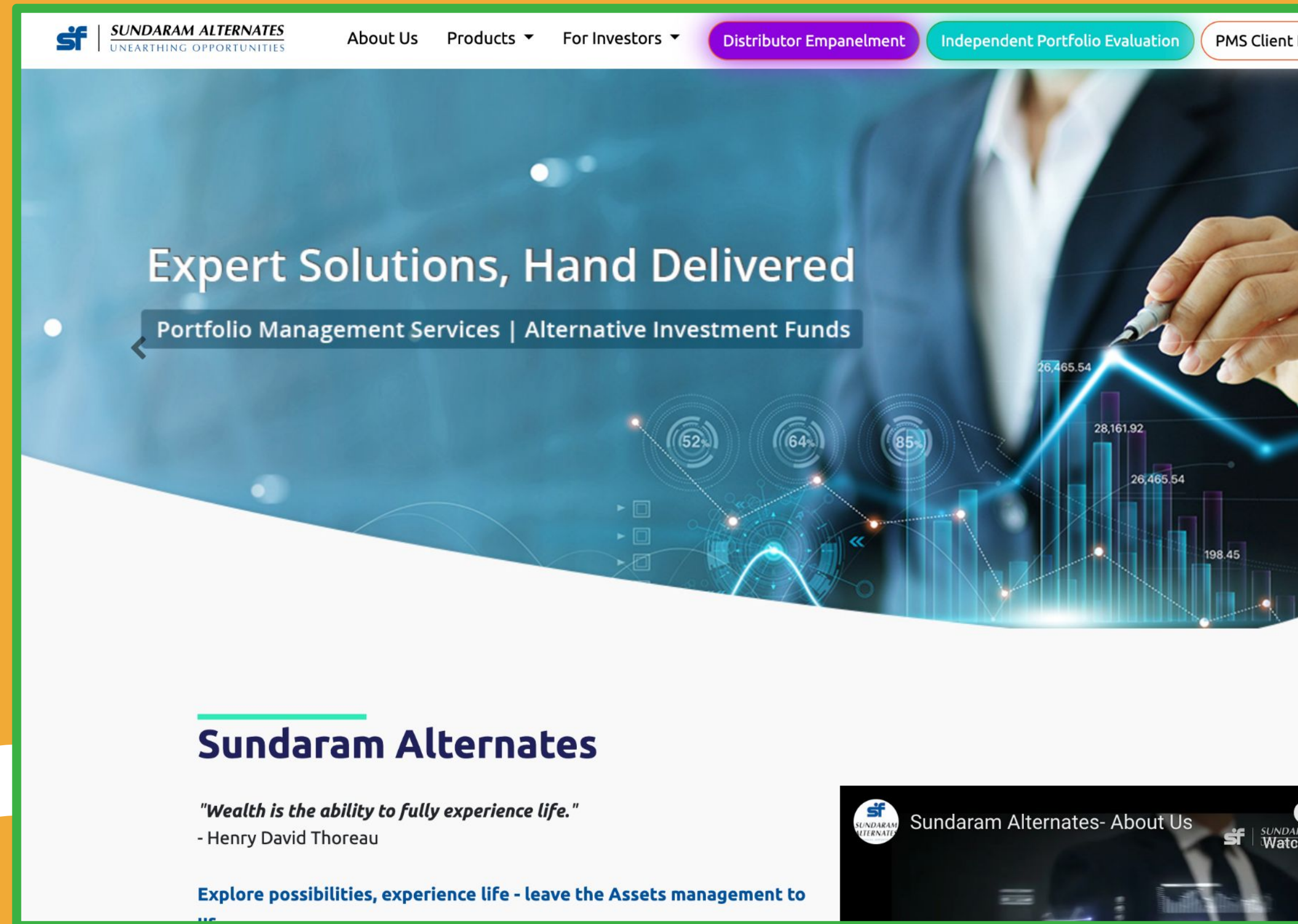


Primary research and brand positioning

for a leading BFSI company

Objectives:

1. **Primary research** for client's internal team and partners to understand their perception of the brand
2. **Secondary research** to understand competition brand positioning
3. **Positioning strategy** based on analysis of internal employee insights and competition benchmarking

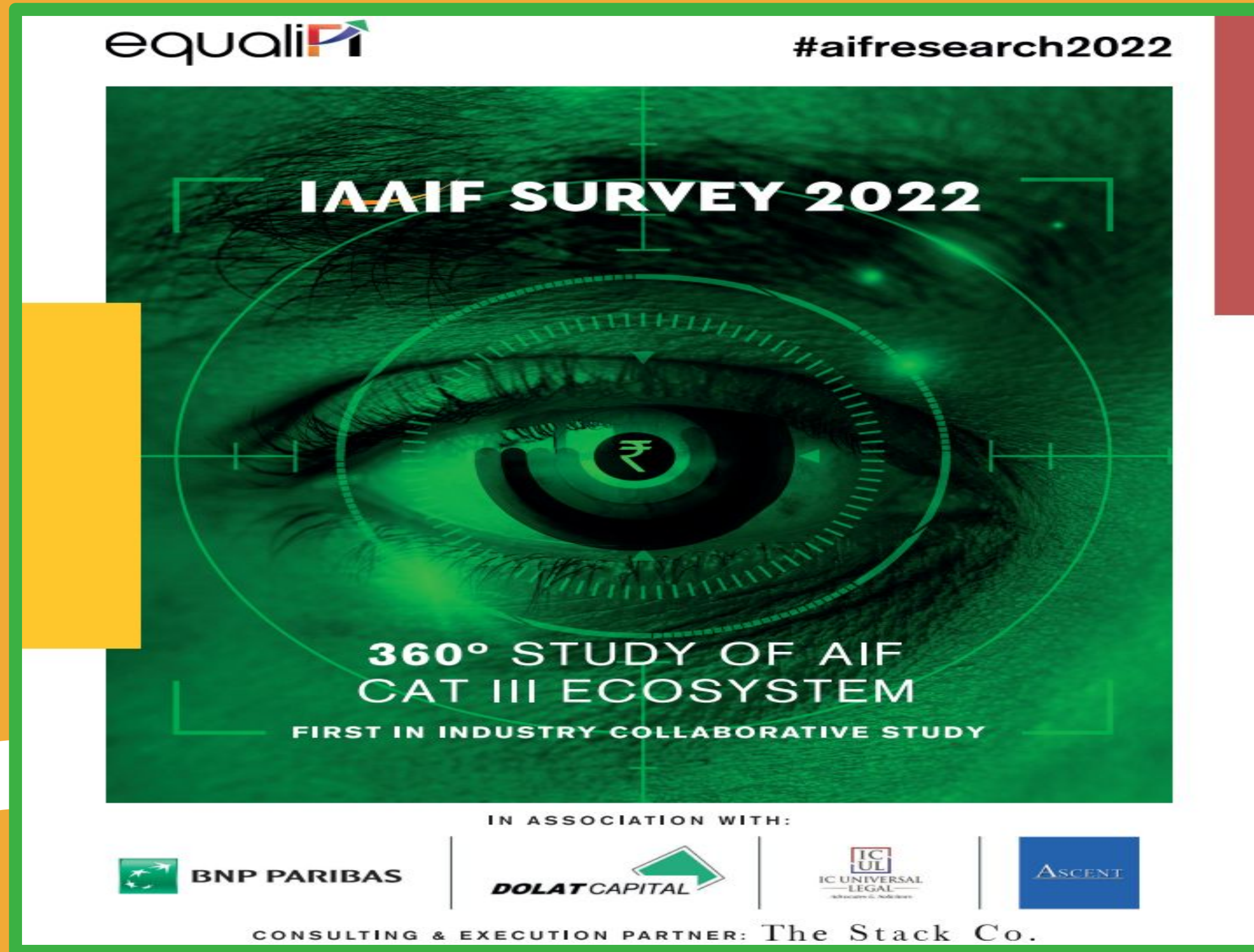


Research & industry report

for a collaboration between the AIF Industry Association, AIF manufacturers, leading banks, legal & tax firms, and a global fund accountant.

Objectives :

1. **Primary research** for understanding the AIF industry landscape in India, potential for AIF growth, existing challenges & opportunities
2. **Secondary research** to understand stakeholder views (Wealth managers, Manufacturers, HNIs/Family offices)
3. **Research report** based on in depth study, interviews, online survey, focus group discussions



Research & industry report

for a leading AIF manufacturer

Objectives:

1. **Primary research** with some of the largest intermediaries to understand the asset allocation towards alternatives and the scope for growth
2. **Secondary research** to understand the alternatives industry; its growth, regulatory changes and future potential
3. **Research report** highlighting the trends in the alternatives space and projecting the evolution of the industry over the next 5 years

Report will be released in March 2023



Market entry strategy

for an international financial services provider

Objectives :

1. **Market study** to understand the overall investment landscape in India; covering products, markets and competition
2. **Primary research** to understand the distribution landscape in India and the partnership opportunities
3. **Execution support** by being an implementation partner for the products and platform

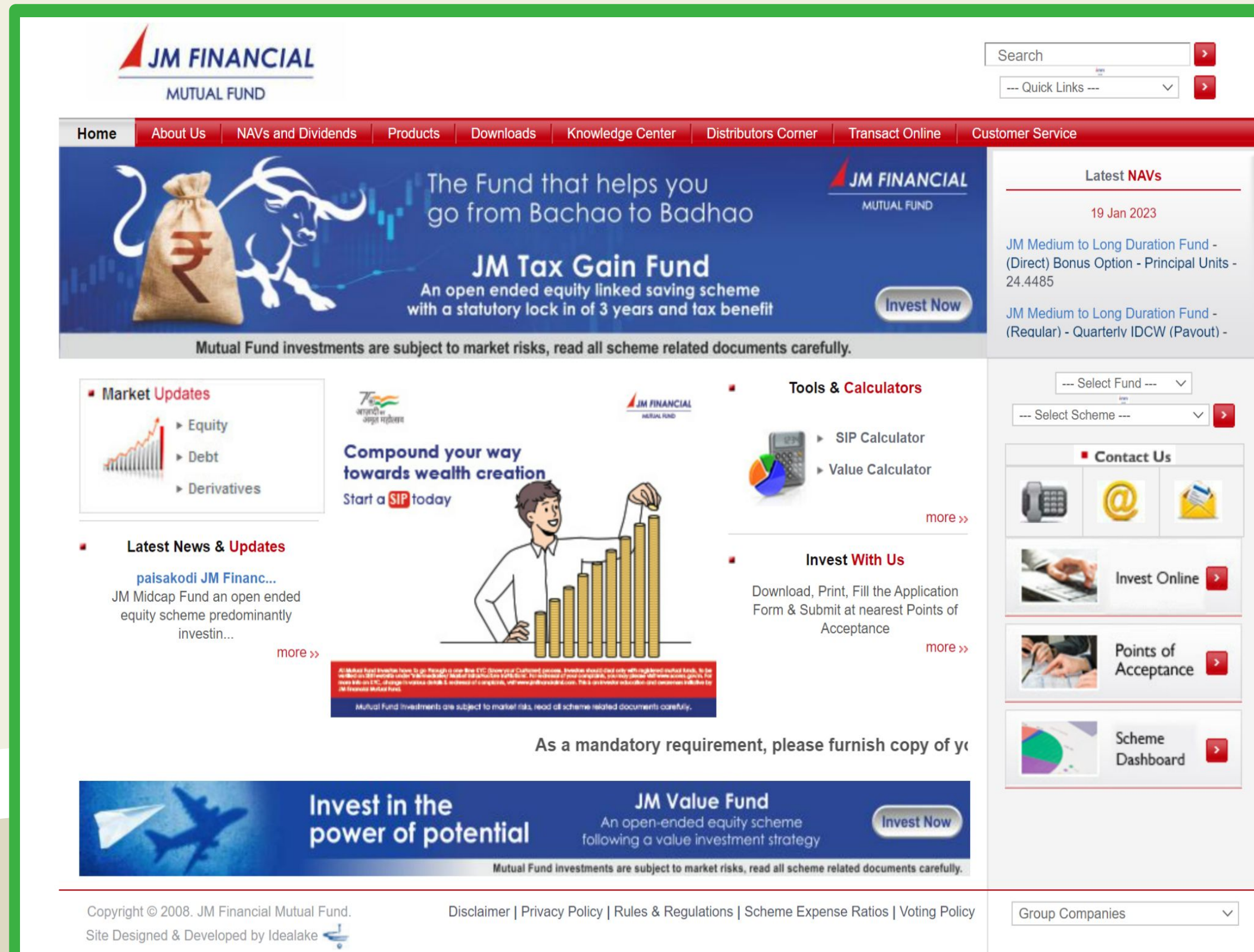


Assessment of digital assets to improve usability

for a leading Mutual Fund

Objectives:

1. **Secondary research** to understand the various aspects which are essential for creating a website
2. **Competition research** to analyse and compare the best-in-class websites across BFSI, based on specified criteria
3. **Data analysis and benchmarking** to highlight the top websites among the competition for each of the criteria
4. **Dipstick survey** to validate the findings of the exercise



Consulting from ideation to implementation

for a financial distribution start-up

Objectives:

1. **Market study** to understand the potential and competitive landscape
2. Value proposition, product, platform and business model definition
3. Business plan and operating plan of the proposed entity
4. Go to market strategy for the launch of the distributor platform in collaboration with largest Mutual Funds



Research + New Business strategy

for a global food ingredient manufacturer

Objectives :

1. **Primary research** for client's internal team, stockists, chemists, end consumers
2. **Secondary research** to understand industry growth drivers
3. **Business model & operating model** for launching a new marketplace for niche food products - like zomato, swiggy etc.



Marketing PMO (Project Management)

for a leading wealth management company

Objectives:

1. Managing all **marketing** initiatives of the company
2. Collaborating with **product** team , **sales** team , **leadership**, external **vendors** to drive optimised results - designated team members
3. **Vendor evaluation, selection, onboarding, KPI management** for - digital marketing, content creation, creatives, marketing/product communications
4. **Communication** & content strategy for wealth and estate planning business
5. **Project management** for marketing vendors

Ladderup Wealth Management Helps People To Accumulate, Manage And Preserve Their Wealth So That They Can Afford And Enjoy The Things That Really Matter To Them In Life

Multi **Family** Office

WEALTH MANAGEMENT

It Is Irreplaceable Because Your Wealth Is Accumulated After Decades Of Hard Work.



Business Strategy + Project Management

for a collaborative distribution platform

Objectives :

1. End to End project management - **from ideation to execution**
2. **Go to market strategy** for the launch of the distributor platform in collaboration with largest Mutual Funds
3. **Marketing & Communication** strategy to enable brand awareness and monetization
4. **Platform strategy , vendor selection** selection and management



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**YOUR PARTNER IN
BECOMING A
SUCCESSFUL MUTUAL
FUND DISTRIBUTOR**
#BusinessSetHai



- End to end operational support
- Best in class training
- Support by AMCs
- NSE as transaction partner

Start Your Business

**Looking forward to
working with you**

THANK YOU

Do you have any questions?

*Deepika Asthana : deepika@eleveight.in
Upasana Koul : upasana@eleveight.in*