

Building a Resilient Portfolio Beyond ESOPs

Arjun Reddy

A US-based NRI with significant wealth from employee stock ownership plan (ESOP) allocation

Goal

- Broaden financial portfolio beyond ESOPs

Challenge

- Over-reliance on ESOP for wealth generation
- Seeking diversified growth beyond traditional investments

Way2Wealth PRAVA Intervention



Fixed Income Strategy

Ensured a solid foundation with tailored fixed-income solutions for security and steady returns



Global Expansion

Expanded investment horizon with global funds, accessing international growth opportunities



Emerging Market Entry

Diversified portfolio into Alternative Investment Funds (AIFs) focusing on the unlisted space, tapping into new growth avenues



Curated Equity Solutions

Implemented select equity strategies to capitalize on unique market opportunities, after thorough research



Outcome



Wealth Diversification

Shifted Arjun's ESOP-centric wealth to a well-rounded, resilient portfolio



Innovative Growth

Engaged in high-potential sectors and markets for enhanced growth prospects



Financial Stability

Maintained a balance of security and growth, aligning with Arjun's long-term financial objectives