

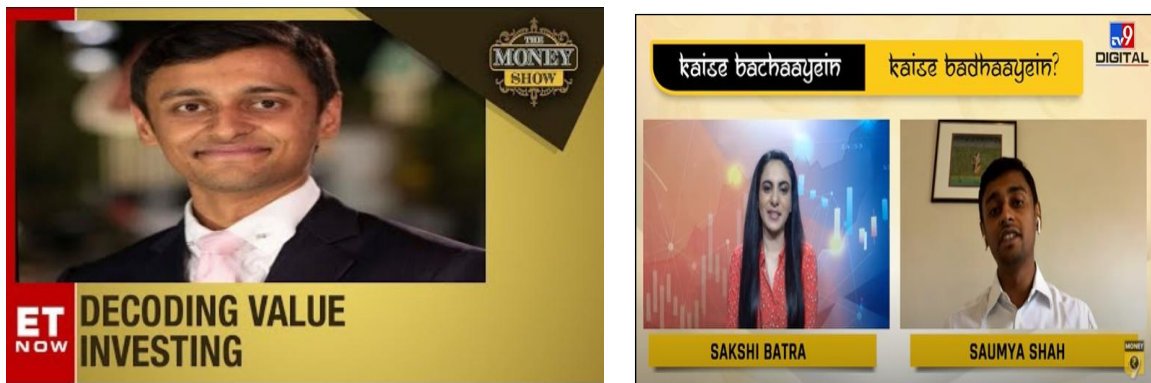
## Brand awareness project for an early-stage fintech startup

**About the startup:** Founded in 2018 by Saumya and Shaily Shah, who holds an MS in finance from The University of Texas at Dallas, Tarrakki is a full-stack wealth management platform that aims to help people invest smartly by giving them different investment options, and unbiased investment advice.

**Plan & Strategy:** Started introducing the brand and its' founders to the journalists covering finance and startup. In the first 60 days of relationship-building meetings, secured 10+ media stories utilizing a partnership announcement.

Below are snippets of media coverage secured for the Founders of Tarrakki

### Television Interviews with Economic Times Now (ET Now) and Money9 (TV9)



*Successfully achieved 100,000 + views/ impressions including television and Youtube*

### Secured a podcast conversation with IWM- Paisa Vaisa Podcast



**Secured two feature interview stories:**

## HOW AHMEDABAD-BASED WEALTH MANAGEMENT STARTUP TARRAKKI IS HELPING BHARAT INVEST

Founded by Saumya and Shaily Shah in 2018, wealth-tech startup Tarrakki aims to demystify the world of financial investing and make investments affordable for the masses.

### Tarrakki | Wealth Management and Investment Advisory Services

By Mamta Sharma -



Founded in 2018 by Saumya Shah, Tarrakki offers solutions to both consumers and corporates – so that the SMEs and MSMEs can efficiently manage their working capital requirement and surplus cash. The new-age technology used by the personal finance platform enables its users to make regular, calculated investments in mutual funds and peer to peer lending, based on their individual life goals, in keeping with their income, age group, and risk appetite.

**Provided content support for news articles and personal opinions on behalf of the Founder. Below are the published links:**

[Strategies to Adopt While Investing in a Mutual Fund](#)

[Track Your Financial Goals, Risk Appetite, Gold Prices Before Investing](#)

[Mother's Day 2021: Smart Gifting Ideas to Secure Your Mother's Financial Future](#)

[Compounding & Rupee Cost Averaging: A Boon for Investments](#)

[Fintech Innovation Changes Personal Finance Dynamics in India](#)

[Roadmap to Financially Strong Retired Life](#)

[How to Set Your Personal Finance Goals & Work Towards Them](#)

[A Beginner's Rulebook to Avoid Mistakes in Investments](#)

## Secured opportunities in 10+ industry news stories by providing views and comments

### The appeal of passive investing

With 7 index funds, 3 ETFs, and 3 Funds-of-funds launched, mobilizing a total of Rs 2,278 crore rupees, the passive investment segment far outshined the number of income schemes (5) and growth-oriented mutual fund schemes (3) between January-March 2021.

IRA PURANIK | JULY 06, 2021 / 08:27 PM IST

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"Passive investing is slowly gaining ground in India as several mutual funds have launched index funds. Index and passive funds are a great way for investors to save on high fund management costs. Investors can earn 0.5% to 1.5% higher returns vs actively managed funds due to low expense ratios. Several actively managed funds are failing to beat the index, making passive and index funds a very attractive offering. We have seen several AMCs launch passive funds in the last 3-5 years as there has been a strong demand for passive products as investors have become aware of high expense ratios and poor performance of many actively managed funds", said **Shaily Shah, Co-founder, Tarrakki, an online mutual fund investment app.**

### Explainer : SEBI mandates integrated, single platform for all mutual fund services

With this platform, requests for changes across funds managed by various RTAs could be serviced in one go, instead of separate, individual requests for each of them. All necessary documentation will be integrated and seamless, irrespective of the fund house involved, thereby reducing the time, cost and efforts involved.

IRA PURANIK | JULY 28, 2021 / 01:19 PM IST

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However, **Saumya Shah, Founder, Tarakki, a wealth management application,** said that the incremental risk involved in such a structure is low. "SEBI has mandated RTAs to take up proper cybersecurity measures to protect user data and set up Business Continuity Plan (BCP) and Disaster Recovery (DR) as well. Given, most of the data on the proposed systems is something that is already available with CAMS and Karvy, it does not pose a huge issue."

### 'SIP' some lessons behind the big wins in Paralympics and stock market

India's total gold medal tally before this Paralympics was a mere 4. This year alone, we won 5 golds, 8 silvers, and 6 bronze medals. While the Paralympics are a testament to the resilience, spiritedness, patience, and commitment of our athletes, there are some underlying insights for all of us to adhere to when it comes to winning handsomely in the stock markets as well!

**Saumya Shah, Founder, Tarakki,** an online investment app, has a solution. According to him, "In the past year, markets have, time and again, touched new highs and this will continue as our economy expands from a \$2.78 trillion to \$5trillion probably by 2025-26. Keeping this in mind, one should continue investing via SIPs as they can capture the volatility and movements of the markets and avail the benefit of rupee cost averaging. If one has an investment horizon of 5+years, investing in equity mutual funds can be the best opportunity for wealth creation. For short-term goals less ranging from 12-18 months, capital protection should be of utmost importance and one should continue to invest in debt mutual funds", he signs off.

### Nifty crosses 16,000! Take a look at the history and important landmarks of the benchmark index

Experiencing an upside of 14 percent so far this year, Nifty has been on a stupendous rally, inching up 1,000 points in the last six months.

IRA PURANIK | AUGUST 03, 2021 / 10:13 PM IST

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"Markets touching all-time high are a combination of various factors including global liquidity, decent operational performance in multiple sectors, and various government support schemes. However one should not get carried away by the buoyancy in the markets as some signs of stress are visible too", said **Ronak Gala, Fund Manager, AlphaQuest, Tarakki,** an online investment app.


## Press announcement: Secured media coverage across top financial & startup news portals like CNBC, ETBFSI, BW Disrupt, Yourstory, etc.



**Tarakki raises growth capital from angel investors to expand its reach to millennial investors**

With the fresh round of growth capital, Tarakki plans to launch new products and expand their portfolio by offering an extensive range of alternatives to young investors to pick and choose from based on their requirements which includes digi-gold and other alternative investment asset classes.

ETBFSI • April 21, 2021, 15:03 IST



**tarrakki, inks partnership with smallcase to offer diversified investment options**

tarrakki, has tied up with smallcase to strengthen long term equity investment options for users

ETBFSI • Updated July 22, 2021, 18:35 IST

tarrakki, wealth management startup, today announced its strategic partnership with smallcase to offer long term equity portfolio to their users. The partnership will enable investors to invest in a well-diversified basket of stocks carefully chosen with a multi cap and multi sector strategy. The strategic collaboration further corroborates tarrakki's mission to make investments easy, hassle-free and transparent.



**Tarrakki Raises Growth Capital In A Pre-Seed Round From A Clutch Of Investors**

The wealthtech startup distinguishes itself with interesting offerings that allow minors as young as 10 months old to start investing and create a portfolio for themselves where parents can save on behalf of their children or the minors can start investing early.



**Wealthtech start-up tarrakki partners smallcase to strengthen long term equity investment options**



### Tarrakki inks partnership with Smallcase

Tarrakki, a wealth management startup has announced a strategic partnership with fintech company Smallcase, to offer long-term equity portfolio to their users.

As per the company, this partnership will enable investors to invest in a well-diversified basket of stocks carefully chosen with a multi-cap and multi-sector strategy. It will also help Tarrakki's mission to make investments easy, hassle-free and transparent.



**Fitterfly, Tarrakki raise early-stage funding**