



Weekly Wealth Report

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How to Create a Spectacular Wealth with Simple Strategy?



The fascinating story of Ronald Read, an American janitor and gas station attendant who, when he passed away in 2014, left behind an \$8 million (Rs 64 Crore) fortune.

This story can be more relevant when the markets are going down and majority of the investors feeling anxious about the downtrend. The striking story is not about some magical investment strategy or discovering the next big thing.

This gentleman working as a Janitor and investing in Stocks for 25 years. When he died, his portfolio included 95 stocks across industries like healthcare, telecommunications, utilities, and consumer goods.

He believed only in long term investing, and he allowed his money to grow and compound over decades.

Most investors chase the noise: "What's the high performing Mutual Funds and Stocks?" "Is the market crashing?" This approach is a recipe for disappointment.

Seasoned wealth builders know real wealth grows quietly. It's built by investing in fundamentally strong companies and letting them thrive over time. The Long-Term Growth Portfolio is crafted with this principle at its core—and it goes one step further.

This story offers valuable lessons to all Investors at todays context, wealth creation happens when you are patient investor for decade or at least for 5 complete years.

The next time you feel the urge to make dramatic changes to your portfolio or chase the latest investment trend or the temporary losses in the stock market, remember Mr Richard, the Janitor who made 64 Crore.

Weekly Market Pulse

Domestic equity markets fell after posting a spectacular gain on 2nd Jan as key benchmark indices BSE Sensex fell around 1.44%.

The fall was broad-based as the mid-cap segment and the small cap segment fell further closed in red with 4.87% and 5.69% respectively.

Losses widened due to the weakening rupee and heavy selling by foreign institutional investors.

Indian equities closed lower on Friday due to declines in heavyweight financial and energy stocks as investors were concerned about corporate earnings.

India Manufacturing Production increased 5.80% in November compared to 4.10% in October.

The top losers were Shriram Finance, IndusInd Bank, Adani Enterprises, NTPC and Bharat Electronics Ltd, which were down 3.64-5.33%.

The top gainers were TCS, Tech Mahindra, HCL Tech, Wipro and Infosys, which were up 2.59-5.62%

US unemployment rate went down to 4.1% in December from 4.2% in November

S No	Index	Jan 1st Closure	10th Jan Closure	Profit / Loss in %
1	BSE Sensex	78507	77378	-1.44%
2	BSE 150 Midcap	16044	15263	-4.87%
3	BSE 250 Small Cap	7134	6728	-5.69%

Mutual Fund Corner

Edelweiss Balanced Advantage Fund



The fund dynamically changes asset allocation across equity, debt, cash and derivatives (including hedges), based on valuation cycles

The Fund manager will increase the exposure to equity when market valuations are attractive and will prune the equity exposure by increasing cash or debt exposure and/or through hedging when equity markets get expensive or experience volatility.

Allocation to equities and debt & money market instruments can be in the range of 0% - 100%.

Asset allocation is determined based on proprietary model combining valuation parameters like P/E & P/B along with the yield gap to determine net equity allocation.

The model may use qualitative overlay of fund management team from time to time to arrive at final equity allocation

To invest in SIP & in Mutual Funds Click the link and start your investments instantly (You can also call us @ 7810079946)

<http://www.assetplus.in/partner/sathishkumar>

Stock of the Week

Mastek

CMP – 2950

Target – 3599 (In 12 – 18 Month's Time Frame)

Established in 1982, Mastek is a provider of vertically-focused enterprise technology solutions. Having its presence in IT industry for almost 4 decades, Mastek Ltd has evolved from an IT solutions provider to Digital transformation partner.

Strong Long Term Fundamental Strength with an average Return on Capital Employed (ROCE) of 93.11%

Healthy long term growth as Net Sales has grown by an annual rate of 25.96% and Operating profit at 31.54%

Nil debt company

Positive results in Sep 24

High Institutional participation of 22%

With ROCE of 17.3, it has a Attractive valuation with a 3.8 Enterprise value to Capital Employed

For your Equity recommendation – open a De Mat account with Angel Broking with this link

<https://app.aliceblueonline.com/openAccount.aspx?C=SSP03>

This week Media Publications

My Recent Article in Nanayam Vikatan – Don't do these 5 Purchases / Spending. Get your copy at your nearest book store.

<https://www.vikatan.com/personal-finance/money/money-saving-guidance-4>

Market Outlook and 3 Best Investment Ideas for 2025



<https://www.youtube.com/watch?v=EUhYCvOFkQc>

What an investor should do in this Falling Stock Market?



<https://www.youtube.com/watch?v=reS8GVuqBsw>

5 Small Steps to 1 Million Dollars



<https://www.youtube.com/watch?v=yW70kZfhpSo>

How do you get your Money Doubled?



<https://www.youtube.com/watch?v=EPiITkuixXY>

5 Millionaire Habits that can change your Finances in 2025



<https://www.youtube.com/watch?v=bNAmkRDskdQ>

All you want to learn about Mutual Funds

Kickstart your Investment Journey of 2025 from here

WELCOME TO THE WORLD OF MUTUAL FUNDS
- BEGINNER (TAMIL)

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25th DEC

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- > A-Z of Mutual Funds
- > Master the art of SIPs
- > Build Wealth Like a Pro

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2. Master the Art of SIP's
3. Build Wealth Like a Pro
4. Recorded session contains 8 Chapters in Tamil Language
5. Lifetime Access

Click the below link for your Mutual Fund course purchase

<https://sathishspeaks.akamai.net.in/new-courses/5-welcome-to-the-world-of-mutual-funds>

All you want to learn about Stock Market

Kickstart your Investment Journey of 2025 from here

STOCK MARKET SIMPLIFIED COURSE (TAMIL)

8 CHAPTERS

1ST CHAPTER FREE

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- » 6 POINT FILTER TO SELECT A HIGH PERFORMING STOCK
- » LEARN MACRO-ECONOMIC TRENDS IN STOCK PICKING

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Key Highlights:

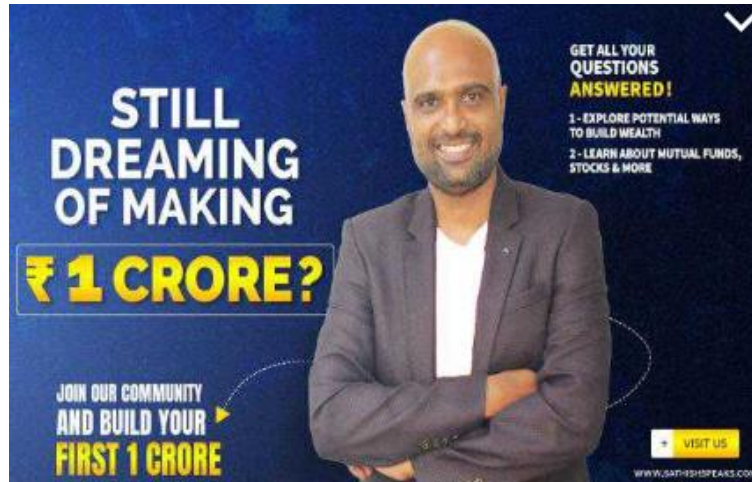
1. Key entry and exit points of the stock market
2. 6-point filter to select a high-performing stock
3. Learn macro-economic trends in stock picking

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My First 1 Crore Club

Are you still dreaming to achieve a net worth of ₹1 crore?



Still dreaming how to make 1crore?

Still Wondering how a salaried person/professionals can make 1cr?

To all the questions in your mind here is the potential ways to build it through Mutual Funds, Stocks and Much More...

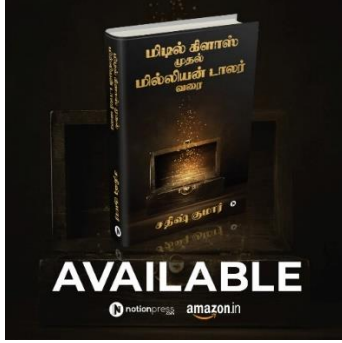
Why do you have to join this Community?

- Having money but still doesn't know how & where to invest?
- Selecting wrong Stocks?
- Selecting wrong mutual funds?
- Invested in all possible ways still money haven't doubled?

To all these there is one solution Join our First 1cr Club Webinar by paying just 499/- by clicking the below link

<https://sathishspeaks.akamai.net.in/new-courses/1-my-first-1cr-club>

Middle Class to Million Dollar Book



Man and his struggle to generate and preserve wealth is eternal. One thing which is common among everyone in this society, that everyone has financial dream and aspiration to become Crorepati.

Middle Class to Million Dollar is a guide to understand how simple and common sense in Personal Finance can help you to get wealthy Corpus.

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Mutual Funds and Stock Market Investments are subject to market risks, pls read all scheme related documents carefully. Past performance of the mutual fund is not necessarily indicative for future performances. Mutual fund does not guarantee any returns or dividends.

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