

Dezerv - One stop solution for all your investing needs

The image shows the Dezerv logo, which consists of the word "dezerv." in a white, lowercase, sans-serif font. The logo is centered on a solid black rectangular background.

Bengaluru, Karnataka May 19, 2023 ([IssueWire.com](https://www.issuewire.com)) - Upgrades happen on professional and personal fronts all the time. Salaried professionals hit milestones like promotions and the addition of new family members every few years.

But sadly, investors don't upgrade their investment portfolios to match their new personal and financial situations. This is partly due to a lack of direction and awareness. But the primary reason is that investors work with advisors/brokers not equipped to handle a range of products that can adapt to your changing needs.

For example - A broker that offers investment in different asset classes (like equity, bonds, and gold) through various instruments (like mutual funds and stocks) probably doesn't provide advisory services to help you invest in the right investment products. Or you probably work with an investment advisor with mutual fund expertise only.

Long story short: Your investment portfolio must evolve to reflect the changes in your personal and financial situations. And for this to happen, you must work with investment professionals who are not only experts on a range of investment products but also enable you to invest in them.

Dezerv: Your one-stop investing solution

[Dezerv](#), a wealth tech startup, was founded in 2021 to solve this problem by offering a full stack of expert-led investment products and services. They offer a wide range of products from an easy-to-use 'Wealth Monitor App' to 'Dezerv Innovation Fund,' an Alternative Investment Fund (AIF) that gives you access to high-growth startup investing opportunities.

The people behind Dezerv are veterans of the investment industry, having worked at marquee investment firms like IIFL Wealth, Kotak Wealth, and Anand Rathi Wealth Management.

Courtesy of the founding team's reputation and the full-stack investing solutions offered by Dezerv, the startup is managing more than Rs. 2,000 crores in just 2 years of operations.

Let's have a look at the investment products and services Dezerv offers.

Dezerv Wealth Monitor App

The [Dezerv Wealth Monitor App](#) is a free and easy-to-use app that helps you identify the red flags in your mutual fund investment portfolio and optimize it.

The app analyzes 4 aspects of your mutual fund investment portfolio:

- Performance
- Risk exposure
- Diversification
- Investing discipline

A neat feature of the app is it identifies missed gains because of fund underperformance. This is calculated as the difference between the gain/loss of your fund and the gain/loss of the benchmark the fund was supposed to beat.

Dezerv Wealth Monitor has identified more than Rs. 175 crore missed gains across thousands of investors who have used it to analyze their mutual fund portfolios. Further, it has analyzed mutual fund portfolios valued at Rs. 3,000+ crore.

Dezerv also plans to introduce a stock analysis tool in the coming weeks that will help you identify the red flags in your stock portfolio.

Dezerv Mutual Fund Portfolios

Popularly referred to as 'IPAs' because of the 'Integrated Portfolio Approach' that the Dezerv team has used to construct the mutual fund portfolios.

The best part about this product is that instead of offering individual mutual funds that most other investment platforms do, Dezerv offers diversified investment portfolios. The investment team actively monitors the investment portfolios and rebalances them as and when required.

Dezerv Select Program

Dezerv's Select Program is reserved for Dezerv's most elite users. To become a Dezerv Select member, you must invest in either mutual fund portfolios or portfolio management services.

Dezerv Select is a comprehensive wealth management program that helps you get the best out of your money via diversified investment portfolios, expert financial advice and regular reporting and portfolio reviews. Dezerv plans to offer many more exclusive benefits to its Select members in the future.

Dezerv Portfolio Management Service

Dezerv's [Portfolio Management Service](#) is a unique HNI investment product for two reasons:

- Investment portfolios are constructed using direct mutual funds, not stocks
- The fixed management fee is 0% instead of the usual 1-2% charged by other PMSes

Both these unique features help boost your investment returns while offering portfolio diversification and customized asset allocation. These features are absent in most other PMS Services in India.

Further, the founders and the core team of Dezerv invest in the PMS heavily, thereby having skin in the game.

Dezerv PMS manages over Rs. 850 crores and has offices in Mumbai, Bangalore, and Delhi.

Dezerv Innovation Fund

Dezerv Innovation Fund is an Alternative Investment Fund (AIF). AIFs are specialized investment products that pool investor money similar to mutual funds but are reserved for sophisticated investors and require a minimum investment of Rs. 1 crore.

Dezerv Innovation Fund is a category-1 AIF that is set up as an Angel Fund. Simply put, it enables investors to invest in early-stage, high-growth startups. Also, since it is set up as an Angel Fund, the minimum investment required to participate is Rs. 25 lakh instead of the usual Rs. 1 crore.

Summary of Dezerv's products and services

1.

Product/Service: Wealth Monitor

Description: The app analyzes your mutual fund investment portfolio

Minimum investment: N/A

Feature(s): Get analysis and suggestions to optimize your mutual fund portfolio

2.

Product/Service: Integrated Portfolio Approach

Description: Diversified mutual fund portfolios

Minimum investment: Rs. 50,000

Feature(s): Designed to suit different risk profiles

3.

Product/Service: Dezerv Portfolio Management Services

Description: Customized mutual fund offering with a 0% management fee

Minimum investment: Rs. 50 lakh

Feature(s): A rare PMS that is a mutual fund based. One of the most affordable fee structures.

4.

Product/Service: Dezerv Innovation Fund

Description: Angel fund that enables you to invest in high-growth startups

Minimum investment: Rs. 25 lakh over 4 years

Feature(s): Deal-based investing. Potential to generate higher returns than listed stocks.

Dezerv is rapidly growing and plans to introduce more investment products and services that empower investors to create wealth with expert guidance.

Dezerv is the perfect one-stop solution for all your investing needs.

Media Contact

Dezerv

kush@6smarketers.com

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