Billionz

BUILDING WEALTH FOR GENERATIONS

PRIVATE WEALTH · MULTI-ASSET, MULTI-GEOGRAPHY

We build wealth across assets, geographies and generations.

BUILDING WEALTH FOR GENERATIONS

MULTI-ASSET

MULTI-GEOGRAPHY

INSTITUTIONAL GOVERNANCE

COMPLETE OWNERSHIP

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How Are We Different

Two decades of treasury risk DNA, applied without conflict to your family's wealth.

Category	Traditional Wealth Managers	The Billionz Way
Skin in the Game	Zero capital at risk — you bear 100% of the downside.	We co-invest alongside you. If we don't own it, we don't recommend it.
Track Record	Retail brokerage roots, largely untested through downturns.	25 years of treasury DNA — five full market cycles, start to finish.
Asset & Geography	Domestic, mutual-fund biased; blind to global flows.	Global multi-asset mandates — equities, debt, commodities, offshore assets.
Client Coverage	Junior RMs on sales targets, rotating every 12–18 months.	Direct access to seasoned analysts and partners who know your portfolio.
Commercial Incentives	VC/PE-funded, under constant pressure to grow AUM.	Zero external funding, no AUM targets — the freedom to hold cash.

"Because our own balance sheet is deployed alongside yours, we win only when your portfolio compounds."

PERFORMANCE

Billionz Model Portfolio — Performance Since Inception (Feb ’24)

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Metric	Model Portfolio	NSE 500 (Benchmark)
Initial Investment	**₹1.00 Cr**	₹1.00 Cr
Return Since Inception (Feb ’24)	**30.15%**	18.64%
Value Today	**₹1.30 Cr**	₹1.19 Cr
Outperformance	**+11.51%**	—
Maximum Drawdown	**−7.2% (₹7.2 L)**	−18.0% (₹18.0 L)

On an initial investment of ₹1 crore, the Model Portfolio generated approximately ₹11.51 lakh more wealth than the NSE 500, while experiencing a significantly lower maximum drawdown. Portfolio beta stays below 0.7.

Since inception: Feb ’24. Past performance is not indicative of future results.

View Model Portfolio →

02 · GOVERNANCE

Institutional-grade oversight sits above the founding team

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Modelled on institutional wealth-platform governance: not a one-person shop, but independent voices with board-level pedigree convening every month to review strategy, risk and conduct.



Nilesh Vikamsey

ADVISORY BOARD

Former President, ICAI. Chairman, Nippon Life India Trustee Ltd. Ex-Chairman, 360 One Wealth; 15+ yrs Director, IIFL Finance; 8 yrs Chairman/Director, The Federal Bank.



Mihir Nanavati

ADVISORY BOARD

~30 yrs in financial services. Group CFO at Nuvama, 360 WAM and Avendus. Led the launch of Arcil from ICICI, raising ₹12Bn including India's first distressed-asset fund.



Harsh Shah

ADVISORY BOARD

23 yrs in Business Transformation and Corporate Turnaround. Graduate of Harvard Business School's Senior Executive Leadership Program; HBS alumnus.



Chandrajit Pati

ADVISORY BOARD

34 yrs across Indian & global corporates incl. Coca-Cola, Tata Motors and Bharti Airtel. Certified independent director; founder, CP HR Advisory.

Led by an operator who has personally advised 900+ premier families and companies

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ABHISHEK GOENKA

Founder & CEO, Billionz · Founder, IFA Global

Abhishek founded IFA Global at 25 — bringing 25 years of financial market advisory DNA — and later built Billionz as its dedicated multi-family office and wealth platform. Over 25+ years he has personally advised 900+ premier companies and family offices, applying proprietary analytics and a multi-asset, multi-geography approach to deliver bespoke portfolio solutions, tested across five market cycles — 2000, 2008, 2013, 2018 and 2020. He also founded Treasury Elite, hosting podcasts and events for entrepreneurs, and is a Harvard Business School executive alumnus and Landmark leadership graduate, with consulting accolades earned across India and the Middle East.

25+
Years in FX, Treasury & Wealth Management

900+
Companies & family offices advised

2019
'40 Under 40' Entrepreneur Award

— advising families and businesses across the full wealth lifecycle, from creation through preservation to intergenerational transfer.



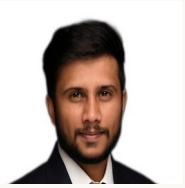
NITIKA BANSAL — Co-Founder & Director

18+ years at IFA Global; co-founded Billionz. Commerce graduate with a management master's from the University of Kent, Harvard executive certifications, and recognised as Inspirational Woman Leader 2024.

A specialised bench sits behind the founders

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RESEARCH & PORTFOLIO



Yash Shah

Senior Analyst, CFA Level 3 Candidate



Manav Agarwal

Sr. Analyst, MBA, CFA



Utkarsh Gupta

Business Analyst, CFA

RELATIONSHIP MANAGERS



Deepak Bhandari

VP, 19 years of experience



Ankit Pincha

VP, 10+ yrs · MBA, IIM Trichy · wealth & IB

SALES & MARKETING



Sneha Khairnar

Wealth Ops Manager · 7 yrs · PGD Finance



Urvita Roy

Lead - Corp Com, MBA



Nitish Gupta

Wealth · RM & BD

Six principles that govern every mandate, without exception

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01 Value & Contrarian

We buy fundamentally sound assets trading below intrinsic value, and are willing to position against consensus when the data supports it.

02 Multi-Asset, Multi-Geography

Exposure is spread deliberately across asset classes and geographies to reduce concentration and capture opportunity wherever it emerges.

03 Risk-First Assessment

Every mandate starts with a formal assessment of risk appetite, liquidity needs and downside tolerance — return targets follow, not the other way round.

04 Skin in the Game

- Before we recommend any external strategy, we ask one question: would we back it with our own capital?
- If the answer is no, it doesn't make the shelf — no exceptions.

05 Rigorous Manager Selection

We place capital only with fund managers of proven pedigree, verifiable track record and institutional process — never because a product pays better.

06 Transparent Fee Structure

Clear, disclosed fees with no hidden costs, and careful consideration of fees and taxes. You always know what you pay, and why.

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Boutique Focus with Institutional Depth

1

Zero Conflict of Interest

With no proprietary in-house funds to push, underperforming managers are replaced without hesitation. Our loyalty is strictly to your portfolio's performance.

2

Treasury & Macro DNA

Born out of institutional financial market expertise, we understand business, promoters, currency movement, interest rate and commodities.

3

Risk-Adjusted Focus

We are extremely focused on risk-adjusted returns — margin of safety is of prime importance in every decision we make.

4

Concentrated Capacity

We take on a limited number of mandates at a time, so your family gets senior attention, not a rotating queue of junior analysts.

05 · ACCESS & FIT

A curated shelf spanning every asset class, sized to your mandate

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Public Markets

- Mutual Funds
- SIF
- Listed Equity
- International Equity / Stocks
- Fixed Income / Debt & Debt++
- Bullion

PMS

- Discretionary PMS
- Non-Discretionary PMS

AIF & Alternatives

- Real Estate AIF
- Performing Credit
- Unlisted Equity
- Gift City
- Pre-IPO
- Others

Real Assets

- Fractional Ownership of Real Estate
- Structured Products
- REITs / SM REITs / InvITs

Debt

- Non Convertible Debentures
- Market Linked Debentures
- Private Debt

Curated across leading AMCs, PMS, AIF and debt managers — each vetted through our own filter before it reaches the shelf. Access and suitability are assessed per mandate; not every instrument is appropriate for every client.

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What clients say



Ajitabh Agarwal, Krishna Pens Pvt. Ltd.

I've always felt supported, never rushed, and I've seen consistent, steady progress toward my financial goals.



Gunjan Agarwal, Mac One Fashion Pvt. Ltd.

The Billionz team is transparent, punctual, and precise — backed by real research capability and deep market knowledge.



Nitin Rathi, Navketan Pvt. Ltd.

Our experience with the Billionz team has been brilliant — there's real peace of mind, and that's deeply comforting.

NEXT STEPS

Portfolio Review — From First Conversation to an Active Mandate

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1

Portfolio Review & Discovery

We review your existing portfolio, then map goals, liquidity needs and risk tolerance.

2

Investment Policy Drafted

A written IPS sets the mandate's guardrails before capital moves.

3

Portfolio Construction

VPS Indicator + Macro Monitor guide the initial multi-asset build.

4

Active Management & MIS

Ongoing rebalancing with regular reporting against the IPS.

A disciplined, repeatable sequence — every mandate begins here before capital ever moves.

LICENSED & REGISTERED Mutual Fund Distributor · AMFI ARN-304261

Let's talk allocation.

Start with a free portfolio review.

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