



ALTPORT

ALTERNATE & PORTFOLIO

EXPERTS

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Presents

CONCLAVE 4.0

IDEAS | INSIGHTS | OPPORTUNITIES



10th
OCTOBER, 2026



9:30 AM
to **5:30 PM**



The Lalit
New Delhi

Fire Brigade Lane,
Barakhamba, New Delhi,
Delhi 110001





SPEAKERS

FOR THE EVENT



SPEAKER

ACHIN GOEL

Portfolio Manager
Bonanza Portfolio Ltd



SPEAKER

RAJESH SINGLA

Fund Manager & CEO
Alpha AMC



SPEAKER

AJAY MODI

Investment Director
Piper Serica



SPEAKER

GURMEET CHADHA

Managing Partner & CIO
Complete Circle



HOST

VIKAS AGARWAL

FOUNDER & CEO –
ALTPORT

OUR PARTNERS



EVENT TIMELINE



9:30 am to 10:30 am		Opening by Mr. Vikas Agarwal
10:30 am to 10:45 am		Tea Break
10:45 am to 12:00 pm		Mr. Rajesh Singla Presentation
12:00 pm to 1:00 pm		Panel Discussion
1:00 pm to 2:00 pm		Lunch Break (Networking)
2:00 pm to 2:30 pm		Mr. Gurmeet Chaddha Presentation
2:30 pm to 3:15 pm		Mr. Ajay Modi Presentation
3:30 pm to 4:15 pm		Mr. Achin Goel Presentation
4:30 pm to 5:30 pm		Closing Remarks by Mr. Samir Kumar

AIF & PMS CONCLAVE 4.0

INSIGHTS | OPPORTUNITIES | GROWTH



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CAPITAL
CONVERSATIONS
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RAVINDRA KUMAR JHA



EVENT FEE

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MEANINGFUL
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VALUABLE
NETWORKING

We look forward to your presence

TOGETHER TOWARDS A STRONGER INVESTMENT FUTURE



MR. ACHIN GOEL

**PORTFOLIO MANAGER
BONANZA PORTFOLIO LTD**

Bonanza

Make Money. Not Mistakes.

About Bonanza

A financial powerhouse! That's what Bonanza is for you! Established in 1994, Bonanza has grown into one of the **largest financial services and broking houses in India** within a short span of time.




1994
Year of
Establishment


650+
Outlets Across
India


234+
Cities
Pan-India Presence


One of India's
Fastest Growing
Financial Services



Technology Driven
Integrated and innovative
platform to trade online
as well as offline.



Dedicated Research
One of the finest and most
dedicated research teams
with deep market expertise.



Strong Affiliations
Affiliated with leading
exchanges and depositories.
NSE, BSE, MSEI, MCX, NCDEX,
NMCE, ICEX, CDSL and NSDL.



Trusted Expertise
Acknowledged industry
leadership and experience
across the country.



Proven Track Record
Multiple mega group
companies and various
titles and achievements.



Our Commitment
To help you grow financially
and take the next step towards
a successful future.



MR. GURMEET CHADHA

**CIO & MANAGING PARTNER
COMPLETE CIRCLE**



COMPLETE CIRCLE

Investing Made Simple



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About Gurmeet Chadha

An entrepreneur since 2015, Gurmeet has created a niche among his clientele. A firm believer in **team identity and team effort**, he loves the diversity of ideas at **Complete Circle**. Gurmeet brings the rich experience of serving retail and corporate clients.

Before starting his venture, Gurmeet worked as **Head of Investments – North Zone for Citibank**. Under his leadership at Citibank, the AUMs grew from **₹3,600 Crores to ₹6,000 crores** over three years. Gurmeet was also associated with **Reliance Mutual Fund** for seven years, serving multiple roles. His last designation was **Regional Head for the Greater Mumbai diaspora**.

A respected name in the Banking and Wealth Management universe, he regularly shares his views on Personal Finance and Equity Investing in **Economic Times, Mint**, and business news platforms like **CNBC, ET Now, and Bloomberg**.

Key Highlights



Entrepreneurial Leadership

An entrepreneur since 2015, building a niche with a client-centric approach.



Leadership at Citibank

Former Head of Investments – North Zone. Grew AUMs from **₹3,600 Cr to ₹6,000 Cr** over three years.



Experience at Reliance Mutual Fund

Associated for 7 years, serving multiple roles. Last designation: **Regional Head for the Greater Mumbai diaspora**.



Team-Driven Approach

A firm believer in team identity and team effort, valuing diverse ideas at Complete Circle.



Thought Leader

Regularly shares insights on Personal Finance and Equity Investing in **Economic Times, Mint, CNBC, ET Now, and Bloomberg**.



Focus on Wealth Creation

Brings deep experience in serving both retail and corporate clients across the Banking and Wealth Management universe.





About **Ajay Modi**

Ajay Modi is the **Investment Director** at Piper Serica, driving firm-wide growth across **venture capital** and **public markets**. He leads the firm's fundraise, managing a VC fund backing visionary founders in **fintech, deeptech, and semiconductors**.

As a key business leader, he oversees **hiring, growth strategy, and investments**. On the **Investment Committee**, he shapes capital deployment. Beyond capital, he works with founders on **organisation building, governance, and long-term strategy**.

He also oversees Piper Serica's **public market investment cycle**, combining market insight with disciplined, long-term value creation. His role spans **fund strategy, capital deployment, and business operations**, working alongside a great team to build a successful and valuable asset management business.

Key Highlights



Investment Leadership

Investment Director at Piper Serica, driving growth across venture capital and public markets.



VC Fundraise

Leads the firm's fundraise, managing a VC fund backing visionary founders in fintech, deeptech, and semiconductors.



Business Strategy

Oversees hiring, growth strategy, and investments across the firm.



Investment Committee

Member of the Investment Committee, shaping capital deployment.



Public Markets

Oversees Piper Serica's public market investment cycle with market insight and disciplined, long-term value creation.



Founder Support

Works with founders on organisation building, governance, and long-term strategy.

MR. AJAY MODI

INVESTMENT DIRECTOR
PIPER SERICA



About Rajesh Singla

Rajesh Singla is one of the Fund Managers of VentureX, bringing over **7 years of specialized experience** in finance and capital markets with a strong focus on **early to growth-stage SME investments**. He drives investment strategy, portfolio management, and long-term value creation across key sectors including **consumer discretionary, technology, chemicals, and manufacturing**.



Key Highlights



7+ Years
of experience in
finance and
capital markets



Focus
Early to growth-
stage SME
investments



Sectors
Consumer discretionary,
technology, chemicals,
and manufacturing



Certified
NISM Modules in AIF
(Category I, II & III) -
AIF Managers



₹50 Cr+
Primary capital
raised across
Pre-Seed to Series A



₹500 Cr+
Secondary transactions
in marquee Pre-IPO,
SME and unicorns



Strong Network
HNIs, family offices
and institutional
investors



Leadership Experience
Over a decade at global
technology companies
like Accenture, Amazon,
Snapdeal etc.



Academic Background
Bachelor in Technology
with a blend of technical
acumen and strategic
insight

MR. RAJESH SINGLA

**FUND MANAGER
ALPHA AMC**

ABOUT US

ALTPORT is one of India's leading process-driven alternative investment platforms, helping investors discover and access high-quality **AIF**, **PMS**, **GIFT City**, **SIF**, and **International Fund** opportunities through a transparent and research-focused approach.



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AIF



PMS



GIFT CITY



SIF



INTERNATIONAL
FUNDS

ALTPORT invests with **precision, not guesswork**. With a tried-and-true framework that can withstand market volatility, we curate a variety of AIF-PMS strategies tailored to every risk profile—**aggressive, moderate, or conservative**—all driven by a single unified process.



500+
Satisfied
Investors



1,000+
Crores
Invested



10
Countries
of Trust



15,000+
Investors Use
Our Tools

With a wealth of experience spanning over **16 years**, we have come to recognize that consistently superior results are achieved by following a well-structured process rather than succumbing to the allure of investment decisions based on short-term trends and recency bias.



ABOUT US



OUR MISSION



Deliver a **precise process** that drives confident investing



Back only **high-conviction, data-proven** fund managers



Simplify market signals into **clear investor actions**



Build portfolios that **protect and grow long-term wealth**



Create steady, **strategic compounding** through discipline



OUR VISION



Be the trusted platform for **long-term wealth creation**



Enable investors to build **lasting, generational value**



Set the standard for **reliable fund manager selection**



Provide a **transparent ecosystem** for consistent compounding



Lead the future of disciplined, **investor-first investing**





VIKAS AGRAWAL

FOUNDER & CEO

The Visionary Behind Our Investment Philosophy

Roots That *Shaped a Leader*



Vikas started out in **Bhilai, Chhattisgarh**, a busy little town that taught him the importance of **values, discipline**, and always wanting to know how businesses succeed. After his bachelor's degree, he got an **MBA in Finance**, which prepared him for almost **25 years** in **Alternative Investments and Digital Finance**.



A Career in *Wealth & Investments*



Vikas has over **25 years of experience** with wealthy investors, and he brings a clear view to the ever-changing world of wealth management.



As **Senior Group Vice President** at **Motilal Oswal Private Wealth** and **Motilal Oswal AMC**, he worked with experienced investors, building trust and creating investment plans that aligned with their goals.



At **HSBC**, he broadened his global view, connecting Indian and international market understanding.



*Ideas. Discipline.
Long-Term Wealth.*



Learning From Legends and **Shaping Philosophy**

Vikas's investment thinking comes from core ideas about value creation. He studied with **Raamdeo Agrawal**, a well-known Indian investor, and learned about business basics, quality, and the value of thinking ahead.

Meeting **Warren Buffett** and **Charlie Munger** was a turning point, reinforcing his dedication to ethical investing, business quality, and patience in growing wealth.



A **Client-First** Approach

Vikas is known for his knowledge and his focus on clients. His clients appreciate his ability to explain complicated investments in a simple, clear way.

His knowledge of business, economic factors, and new industries helps him advise clients who want clarity in a confusing financial world.



A **Continuous** Learner

Vikas is always learning, watching global trends, improving his methods, and learning from market history.

He likes swimming, reading, and learning about different topics, believing that good investing requires both knowledge and emotional control.



The Guiding Force Behind Our Vision

Vikas leads with a mix of strategic thinking, humility, and a client-focused approach.

His goal is to help investors build wealth over time through well-researched and clear investment options.

With his leadership, the firm continues to succeed in AltPort's advisory field, guided by clarity and a focus on investor success.



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BRIGHTER
TOMORROWS

THANK YOU



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DISCIPLINE
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