



ALTPORT

ALTERNATE & PORTFOLIO

EXPERTS

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Presents

CONCLAVE 4.0

IDEAS | INSIGHTS | OPPORTUNITIES



24th
OCTOBER, 2026



9:30 AM
to 5:30 PM



The Lalit
New Delhi

Fire Brigade Lane,
Barakhamba, New Delhi,
Delhi 110001



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ALTERNATE & PORTFOLIO
EXPERTS

THE
Lalit



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



SPEAKER

CA ANUJ JAIN

Chief Investment Officer
and Co-Founder of
Green Portfolio



SPEAKER

ANKUSH JAIN

Director of
StepTrade



HOST

VIKAS AGARWAL

FOUNDER & CEO –
ALTPORT

OUR PARTNERS



EVENT TIMELINE

9:30 AM –
9:45 AM



Opening Remarks
By Mr. Vikas
Agarwal

9:45 AM –
10:30 AM



CA Anuj Jain
Presentation

10:30 AM –
11:15 AM



Achin Goel
Presentation

11:15 AM –
11:30 AM



Tea &
Networking
Break

11:30 AM –
12:15 PM



Rajesh Singla
Presentation

12:15 PM –
1:15 PM



Panel
Discussion

1:15 PM –
2:15 PM



Lunch &
Networking

2:15 PM –
3:00 PM



Ajay Modi
Presentation

3:00 PM –
3:45 PM



Ankush Jain
Presentation

3:45 PM –
4:30 PM



Gurmeet Chadha
Presentation

4:30 PM –
4:45 PM



Audience Q&A /
Interactive Session

4:45 PM –
5:15 PM



Closing Keynote /
Key Takeaways

5:15 PM –
5:30 PM



Closing Remarks
By ALTPORT Team



ABOUT ME

ANKUSH JAIN

DIRECTOR



With **18+ years of experience** in portfolio management, investment research, and due diligence, I specialize in identifying high-growth opportunities and building risk-optimized investment strategies across public and private markets.



I currently serve as **Director at StepTrade Capital**, where I oversee investment decisions across **SEBI-registered CAT II & CAT III AIFs** and a registered **Fund Management Entity (FME) at GIFT City**. I am responsible for portfolio construction, risk management, and performance assessment, with a consistent focus on sustainable wealth creation and capital preservation.

CURRENT RESPONSIBILITIES & SCALE



Managing
~₹450 Crore AUM
across multiple AIF strategies



Raised **₹325 Crore**
of **pre-IPO capital** for **10 companies**
in the last 18 months, supporting SMEs
and emerging businesses in their growth
and listing journeys.

FUND MANAGEMENT ROLES



Chanakya Opportunities Fund I
(CAT II AIF)

India's first SME-Exchange-focused SEBI-registered CAT II AIF, successfully closed in December 2024, including full utilization of the green shoe option.



StepTrade Revolution Fund
(CAT III AIF)

Focused on high-growth SMEs and microcaps, with a strategy designed to capture emerging opportunities and generate strong risk-adjusted returns.



StepTrade India Fund
(CAT III AIF | CAT I FPI)

An open-ended structure designed for NRIs and FIIs under IFSCA regulations, providing access to Indian growth opportunities via GIFT City.

PRIOR EXPERIENCE



Before StepTrade Capital, I spent nearly a decade (**2007-2017**) in commodity and currency research, working with firms such as **Kunwarji, Religare**, and other leading institutions. I was also part of the **Edelweiss Group**, where I managed NDPMS portfolios and developed deep expertise in equity research and portfolio strategy.

“Over the last 18 years, my professional journey has been defined by continuous learning, adaptability, and disciplined investing, contributing to business growth, investor confidence, and long-term value creation.”

A portrait of CA Anuj Jain, a man with dark hair and a beard, wearing a grey blazer over a blue shirt. He is standing with his arms crossed. The background of the portrait is a blue and orange circular graphic with a bar chart.

SPEAKER

CA Anuj Jain

Chief Investment Officer and Co-Founder



Anuj Jain is the Chief Investment Officer and Co-Founder of Green Portfolio, where he leads the research team and chairs the investment committee. With over 15 years of hands-on equity investing experience and 5+ years in financial consultancy, Anuj is the architect behind the firm's investment processes, stock selection frameworks, and portfolio construction methodologies.



15+ Years
Equity Investing
Experience



5+ Years
Financial
Consultancy



Member of
ICAI



Expertise in
Research,
Portfolio Construction
& Risk Management

Anuj works closely with the research team to ensure every investment decision is backed by rigorous quantitative and qualitative analysis, with a focus on identifying under-researched opportunities across market capitalizations.



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



ALPHA
BE RICH...



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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



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.

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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.



DISCIPLINED
INVESTING
BRIGHTER
TOMORROWS



THANK YOU



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www.altportfunds.com

IDEAS
—
DISCIPLINE
—
LONG-TERM
WEALTH

