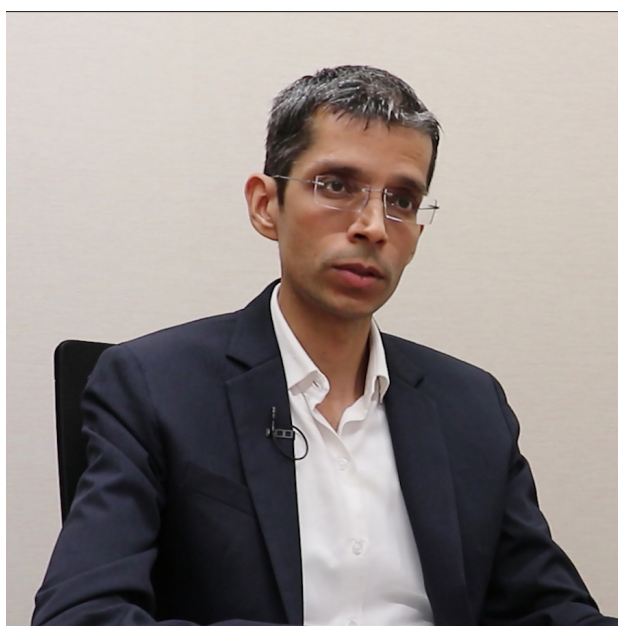


Enhancing the investment process

Gaurav Arora, CIO of ASK Wealth Advisors reveals the investment process and philosophy followed at ASK and how digital and technology are going to change the way the wealth management industry functions.



GAURAV ARORA
ASK Wealth Advisors

ASK WEALTH ADVISORS IS ONE OF INDIA'S leading wealth advisors to Ultra High Net Worth Individuals (UHWIs). Gaurav Arora, Chief Investment Officer, says "the core to our investment philosophy is a very high quality research oriented advisory approach. That is the DNA of the firm since ASK investment managers started their institutional equity research backbone."

A long standing concern in the wealth management industry has been wealth managers following a 'closed architecture' system, pushing their in-house investment management products to clients in order to earn higher fees.

With a pre-existing investment management arm prior to the launch of the wealth management business in 2007, Arora notes that "The benefit we draw out of having an asset management background in the form of our equity and real estate entities is that we have very strong track record of offering quality solutions to clients."

Arora states that even today, "we are a truly open architecture platform and work with all institutions and managers of value and reputation across the industry."

Technology has evolved to the point of providing portfolio insights through mobile applications and the next wave will be to "start providing customised research based on investor preferences defined on their mobile phones."

Arora states that selling new products to clients and delivering long term value are not mutually exclusive at ASK Wealth Advisors. "Whenever we are working on an innovation or a new product, it has to be aligned to the medium to long term in-house view of that asset class." ■