

# Revolutionising Wealth Management:

## Valuefy's Co-Founder on the Strategic Vision and Technological Innovation

Valuefy is a premier investment technology lab with cutting-edge solutions serving the leading financial institutions in India and internationally. The company focuses on clients such as asset and fund managers, wealth managers, and private banks, providing them with a digital platform that features accounting, consolidated reporting, CRM, portfolio and risk management, and other solutions, including execution performance analytics, benchmarking of complex model portfolios, cross-comparisons amongst advisors, and managing rule-based investment mandates. The firm is also increasing its international footprint and will feature in the Hubbis Independent Wealth Management Forum in Dubai. We recently sought to update our knowledge of the firm with the help of the very articulate Shrikant Tiwari, Valuefy's co-Founder and London-based Partner covering Clients & Markets. He explained how Valuefy is expanding its international horizons beyond India, with increasingly active offices in Singapore, Dubai, and London. He reported how the firm remains dedicated to delivering front-to-back wealth management products that are as comprehensive as they are innovative. He explained that the company's core foundation rests on three pillars: data sciences and intelligence, technology, and user experience, which combine to create a robust platform for wealth managers, asset managers, and private banks. He shed light on the company's latest missions to provide a class-leading WealthTech solution, emphasised the importance of a modular approach that caters to the entire lifecycle of a wealth manager, and highlighted the success to date in diversifying its clientele internationally.

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**SHRIKANT TIWARI**  
Valuefy

### Shrikant first explains

that the company's mission today remains the curation and delivery of the firm's core 'Wealthfy' platform, which offers an unparalleled onboarding, compliance, and client lifecycle management tool that integrates seamlessly with local and international regulatory standards, helping the clients with an operating system that can seamlessly conduct all the tasks ranging from customer onboarding, executing transactions, data aggregation, internal and client reporting, and so forth.

He notes that a key advantage of Valuefy's Wealthfy platform is its capability to aggregate data from multiple custodians and

brokers into a singular, secure SaaS platform. "This functionality is crucial in an industry where data dispersal across various systems can hinder efficiency and accuracy," he says. "We also provide a rather unique front office module, which includes an RM workbench and a client portal and app, enhancing the wealth management process across all user interfaces."

### Valuefy's client-centric focus

The company serves clients in two key segments in India and these apply also to other key markets. One is delivering the SaaS product and serving multiple clients, mainly in the mid-sized wealth management bank and firm category. The second segment is the larger banks, such as in India, for example, ICICI, HDFC, Kotak Mahindra and others, or their equivalents overseas. In the second segment, Valuefy takes its base product and then customises it as per its needs and integrates the firm's solutions with its client's internal systems.

### Navigating Complexity with Simplified Solutions

Shrikant articulates the growing complexities within the wealth management sector and advocates for the simplification achievable through technology.

He is especially pleased to report how Valuefy's platform has been instrumental in demystifying the data aggregation process, providing wealth managers with a controlled and accurate view of their portfolios, irrespective of the geographical dispersion of assets. "Data management and analytics are increasingly central to successful wealth managers these days," he comments.

The firm has an upcoming advisory module, which will be aimed at automating proposal generation processes, further indicating Valuefy's intention to enhance operational efficiencies and advisory capabilities in India and overseas, and something that Shrikant says will certainly address a gap in the UAE market for sophisticated, technology-driven advisory solutions.

### Building in the UAE

Shrikant explains that they have been building the offering internationally, with Valuefy's strategic foray into the UAE market - through the Dubai International Financial Centre (DIFC) and Abu Dhabi Global Market (ADGM) - showcasing its commitment to addressing the unique regulatory and operational needs of external asset managers and multifamily offices.

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**« "There are many independent asset management firms founded and run by what I can term 'traditionalist' fund managers who need to innovate and modernise to stay competitive and relevant." »**

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He offers a closer examination of Valuefy's tailored solutions for the UAE market, noting that Valuefy's Wealthfy platform has been making robust headway amongst clients. He reiterates that Wealthfy stands out for its ability to streamline complex onboarding, compliance, and client lifecycle management processes, integrating seamlessly with key regulatory and technological services to offer a digital, paperless experience. The platform's sophisticated portfolio management system, featuring multi-custodian data aggregation, equips wealth managers with unparalleled insights and control, allowing for comprehensive portfolio oversight and decision-making.

### Tailored to the UAE's needs

Valuefy's expansion in the UAE is aimed at seizing on the great opportunities ahead as the UAE develops dynamically to fulfil the goals of becoming a major international, indeed global, hub for wealth management. Shrikant says the Wealthfy platform directly addresses the UAE's strict regulatory requirements, while the emphasis on digital and modular wealth management solutions caters to the region's increasing demand for digital innovation within wealth services. The integration of multi-custodian data aggregation speaks to the fragmented nature of wealth manager data across the UAE, with Valuefy standing out as offering a unified system that simplifies portfolio management in a market characterised by its international clientele and increasingly diverse array of clients and assets.

### Top Ten Quotes from Shrikant to Highlight Valuefy's Missions, Offerings and Commitment

"Valuefy is a multi-geographic organisation. We are present in India, Singapore, Dubai, and London, primarily serving as a wealth tech organisation providing front-to-back wealth management products for wealth managers, asset managers, and private banks."

"One of our key foundations is combining three elements crucial to creating a dependable WealthTech solution: data sciences and intelligence, technology, and user experience. This combination enables us to cater to the entire lifecycle of a wealth manager in a modular nature."

"Our system's strength lies in its ability to aggregate data from multiple custodians and brokers into a single, secure platform. This capability is pivotal for wealth managers, especially in the EAM industry, where data does not reside in one universal system."

"We distinguish ourselves by also providing a front office module, which includes an RM workbench and a client portal and app. This setup ensures seamless experiences across devices and users, streamlining the entire wealth management process."

"The world is becoming more complicated, but we believe it can be simplified with technology. Our platform addresses the complexities faced by businesses operating in multiple jurisdictions, making the data aggregation process simple and in control."

"The challenge in today's wealth management industry is not just about managing complex asset classes but also about providing quality data and a unified system to manage it efficiently. This is where our expertise in data aggregation and technology provides a distinct advantage."

"Our differentiation lies not only in our product's capabilities but also in our service. With a team deeply invested in both technological innovation and customer support, we ensure our clients have a dependable and futuristic system."

"In the UAE, particularly in DIFC and ADGM, we support external asset managers and multifamily offices with our product, Wealthfy, which facilitates seamless onboarding, compliance, and client lifecycle management in accordance with local regulatory requirements. Incorporating our portfolio management system with multi-custodian data aggregation addresses the unique challenges of the UAE's independent advisory industry, where wealth manager data is often dispersed across various systems."

"We are heavily invested in Dubai, recognising its potential for growth in the wealth management sector. Our technology aims to streamline operations and enhance advisory capabilities, thereby boosting the scale of EAMs and improving the quality of relationship management."

"Looking forward, our priorities include eliminating the reliance on Excel, integrating usable AI to improve engagement activities between RMs and customers, and scaling our service model in Dubai to provide top-notch support to our clients."



Moreover, Valuefy's investment in local data hosting and compliance - acknowledging the critical importance of data security and regional regulatory adherence - underscores the company's commitment to aligning with the UAE's digital transformation initiatives, security and privacy concerns.

Recognising the growth potential of the wealth management industry in the UAE, Valuefy is investing significant money, time and effort in the region. Shrikant reports they have successfully onboarded several banks and wealth management firms onto their platform and are working hard to be a pivotal technology partner in the wealth industry's evolution.

### Why Choose Valuefy?

In a competitive domestic and international landscape that only seems to become ever more crowded, Shrikant outlines what sets Valuefy apart. Shrikant emphasises the integration of data sciences, technology, and exceptional digital experiences as the core elements driving Valuefy's product offerings. This holistic approach has enabled the company to deliver a comprehensive suite of wealth management solutions that address the entire lifecycle of wealth management activities while

### Getting Personal with Shrikant Tiwari

Navigating through the dynamic landscape of fintech and wealth management, the story of a Valuefy co-founder Shrikant offers a glimpse into the journey that intertwines personal pursuits with professional achievements. Born in Jaipur and raised near Delhi, his academic path led him from a Bachelor of Arts in Economics at Barkatullah University in Bhopal to an MBA specialising in finance and marketing from IILM Delhi, laying a solid foundation for his future endeavours.

Before Valuefy, his career encompassed a significant tenure at Thomson Reuters, where he learned a huge amount about various facets of the financial sector across global markets. This experience served as a precursor to his pivotal role at Valuefy, where for the past seven to eight years, he has steered the company's growth strategy and market expansion, particularly focusing on the European sector from his current base in London.

On the home front, he shares his life with his wife, who works as a portfolio manager and their 10-year-old child. His personal life reflects a blend of traditional sport, particularly a love of cricket, and family time, often playing football with his son, a Manchester United fan. His weekends are frequently spent enjoying games of badminton with friends and he has more recently been exploring golf, leveraging his cricket skills.

A distinct aspect of his personal journey is his engagement with meditation, having participated in a 10-day intensive retreat. This experience, aimed at mental and emotional detox, marks a significant departure from his professional life, offering insights into the importance he places on mental well-being.

remaining modular and adaptable to the diverse needs of its clientele

"We offer a blend of dependable, futuristic technology coupled with

an unwavering focus on service," he says. "The organisation's balanced team structure, with a significant portion dedicated to servicing and support, ensures

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that clients receive not only a top-tier product but also exceptional ongoing assistance.”

He adds that Valuefy’s forward-looking product development, underpinned by a commitment to innovation and a deep understanding of the wealth management ecosystem, ensures its solutions should remain at the forefront of the industry’s needs.

### Future Directions and Commitments

Looking forward, Shrikant highlights three strategic priorities

for Valuefy: eliminating reliance on outdated tools like Excel, integrating AI to enhance client engagement, and scaling the service model in Dubai to ensure unparalleled support. These goals underscore Valuefy’s ambition to not just keep pace with industry trends but to set new standards in wealth management technology.

### Embracing the Future

Valuefy’s journey exemplifies a forward-thinking approach to wealth management technology. With a commitment

to innovation, a deep understanding of the industry’s challenges, and a clear vision for the future. Shrikant believes Valuefy is poised to continue its trajectory as a transformative force in the global wealth management sector. As the company expands its presence and refines its offerings, its impact on simplifying and enhancing the wealth management process is undeniable, marking a new era of efficiency and client engagement in the financial world. ■

