MUNNETRAM
CAPITAL



Progress, One Step at a *Time*

Mutual funds, SIPs, insurance and NRI investment services — explained simply, executed accurately and serviced with care.

Mutual Funds | SIP Services | Insurance | NRI Services

AMFI REGISTERED MUTUAL FUND DISTRIBUTOR

ARN-108075 · Devan Boobalan

Coimbatore, Tamil Nadu · Serving investors nationwide & worldwide

ABOUT US

Your Partner in *Progress*

முன்னேற்றம்

Munnetram means "progress" in Tamil — the idea at the heart of everything we do.

Munnetram Capital was founded with a simple belief: every investor deserves clear information, honest disclosure and dependable service. Based in Nehru Nagar, Coimbatore, we help individuals, families and Non-Resident Indians access mutual funds and related financial products.

As an AMFI Registered Mutual Fund Distributor, our role is to share information, complete documentation, execute transactions accurately and service your investments over the long term. The decisions always remain yours.

- Investor education comes first
- Transparent commission disclosure
- Paperless, digital onboarding
- Long-term, personal relationships



Devan Boobalan
Founder · AMFI Registered Mutual Fund Distributor

Registered
AMFI Registered Mutual Fund Distributor, ARN-108075.

Transparent
Clear disclosure of how we are paid.

Digital
Online KYC, transactions and reports.

Worldwide
Serving investors across India and abroad.

WHO WE SERVE

Salaried & Families
SIPs, tax-saving investments, insurance and children's future funds.

Business Owners
Long-term investing, retirement-oriented schemes and protection cover.

NRIs & OCIs
Digital KYC, NRE/NRO routing and servicing across time zones.

CREDENTIALS & TRANSPARENCY

Registered, Trained & *Accountable*

Devan Boobalan has completed professional training programmes with institutions including NSE Academy, Moody's Analytics and PGP Academy, reflecting a commitment to continuous learning.



Moody's Analytics & PGP Academy
Course completion certificate · April 2024



NSE Academy & PGP Academy
Training programme certificate · July 2022

Certificates shown are training / course completion certificates and do not represent registration with SEBI as an Investment Adviser.

REGISTRATION

Name	**DEVAN BOOBALAN**
ARN	**ARN-108075**
Valid from	**02-Jan-2025**
Valid till	**01-Jan-2028**

What we are

- AMFI Registered Mutual Fund Distributor (ARN-108075)
- Facilitator of regular plans of mutual fund schemes
- Support for KYC, transactions and servicing
- Transparent about commission received from AMCs

What we are not

- Not a SEBI-registered Investment Adviser
- No fees charged for investment advice
- No promise or assurance of returns
- No rebates, gifts or inducements

OUR CODE OF CONDUCT

- Act honestly and in the interest of investors
- Never promise assured returns
- No rebates, gifts or inducements
- Keep investor information confidential
- Share complete scheme information and risk factors
- Disclose all commissions received
- No churning of investments
- Follow KYC and AML requirements

OUR SERVICES

Services Built Around *You*

From your first SIP to insurance and NRI investing — one relationship for documentation, execution and ongoing servicing.

01

Mutual Fund Distribution

Access regular plans of mutual fund schemes across equity, debt and hybrid categories, with end-to-end transaction support.

02

SIP Services

Set up, manage and track Systematic Investment Plans with auto-debit mandates, step-ups and timely service support.

03

Tax-Saving Investments

Explore ELSS mutual funds and other tax-saving options, with clear information on lock-ins, risks and current tax rules.

04

Retirement Solutions

Retirement-oriented mutual fund schemes, long-term SIPs and SWP set-ups to support your post-work years.

05

Insurance Solutions

Term life and health insurance options from IRDAI-registered insurers, with help on proposals, renewals and claims.

06

NRI Investment Services

Help for Non-Resident Indians investing in Indian mutual funds, covering KYC, NRE/NRO routing, FATCA and online servicing.

07

Portfolio Review & Tracking

A consolidated view of your mutual fund holdings, periodic review meetings and on-demand statements through our investor platform.

08

Child Future Solutions

Systematic investing for your child's education and milestones, including children's schemes and minor folios.

09

P2P Lending

Access to RBI-registered NBFC-P2P platforms for lending participation, with clear information on risks and regulatory limits.

One relationship. Every service request.

KYC, transactions, nominee updates, statements and more — handled by a single point of contact.

+91 95009 54849

OUR PRODUCTS

Products for Every *Need*

Every product has its own features and risks. We share scheme or policy documents and help you understand them before you decide.

MUTUAL FUNDS

Equity Mutual Funds

Schemes that invest predominantly in shares of companies, aiming for long-term capital appreciation.

MUTUAL FUNDS

Debt Mutual Funds

Schemes that invest in bonds, government securities and money market instruments.

MUTUAL FUNDS

Hybrid Funds

Schemes that combine equity, debt and sometimes other assets within a single portfolio.

TAX SAVING

ELSS (Tax-Saver) Funds

Equity Linked Savings Schemes with a 3-year lock-in, eligible for deduction under the old tax regime.

PASSIVE

Index Funds & ETFs

Passive schemes that aim to replicate the performance of a market index, subject to tracking error.

DEPOSITS

Fixed Deposits

Corporate fixed deposits from RBI-regulated NBFCs and housing finance companies, carrying credit ratings.

INSURANCE

Life Insurance

Term life plans from IRDAI-registered insurers that provide financial protection to your family.

INSURANCE

General Insurance

Motor, home, travel and personal accident covers from IRDAI-registered general insurers.

INSURANCE

Health Insurance

Individual, family floater, senior citizen and top-up health plans for hospitalisation expenses.

PLEASE NOTE

Corporate FDs are not bank deposits and are not insured by DICGC. Insurance is the subject matter of solicitation. Check each scheme's riskometer before investing.

HOW WE WORK

Simple, Transparent, *On Time*

01 **Connect**
Call, WhatsApp or visit our Coimbatore office to discuss what you are looking for.

02 **Get Onboarded**
We help complete KYC, FATCA, nominee and bank mandate formalities — digitally.

03 **Choose & Invest**
You select schemes after reading the documents; we execute transactions accurately.

04 **Track & Service**
View holdings online and reach us for every service request along the way.

DIGITAL TOOLS

Investor Login
Consolidated holdings, transactions and capital gains reports — 24×7.

Analytics
Visual analysis of your holdings at analytics.munnetram.in.

NRI Services
Digital KYC and servicing for NRIs and OCIs worldwide.

10 free calculators on our website

SIP · Lumpsum · Step-Up SIP · SWP · Goal SIP · Retirement · Child Education · Inflation · Cost of Delay · Fixed Deposit

Start a SIP from ₹500 a month*

*Minimum amount is scheme dependent. Mutual fund investments are subject to market risks.

WhatsApp Us

DISCLOSURES

Transparency You Can *Trust*

How we are paid

- We distribute regular plans of mutual fund schemes and receive trail commission from AMCs, included in the scheme's expense ratio.
- We do not charge investors any fee for mutual fund distribution. Direct plans, with lower expense ratios and no distributor commission, are also available directly from AMCs.
- Actual commission paid for each scheme is disclosed in your Consolidated Account Statement (CAS).

Key risks

- Mutual fund NAVs move with markets; interest rate, credit and liquidity risks apply. Returns are not assured.
- ELSS and solution-oriented schemes carry lock-in periods; exit loads may apply.
- Corporate fixed deposits, insurance and P2P lending are not SEBI-regulated; disputes about them are not covered under SEBI/AMFI grievance mechanisms.

Grievance redressal

We acknowledge complaints within 2 working days and aim to resolve them within 21 calendar days.

01

Munnetram Capital

Call or email our Grievance Officer.

02

AMC / Registrar

Investor service desk of the AMC, CAMS or KFintech.

03

SEBI SCORES

scores.sebi.gov.in

04

SMART ODR

smartodr.in — online dispute resolution.

Mutual Fund investments are subject to market risks, read all scheme related documents carefully.

MUNNETRAM
CAPITAL

Let's Take the *First Step* Together

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WORKING HOURS
Mon – Sat: 9:00 AM – 7:30 PM

ONLINE
www.munnetram.in · analytics.munnetram.in

Scan to WhatsApp us

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Munnetram Capital (Devan Boobalan) is an AMFI Registered Mutual Fund Distributor, ARN-108075, valid from 02-Jan-2025 to 01-Jan-2028. We are not registered with SEBI as an Investment Adviser. Past performance is not indicative of future returns. Insurance is the subject matter of solicitation. This brochure is for information only and is not an offer or solicitation.