

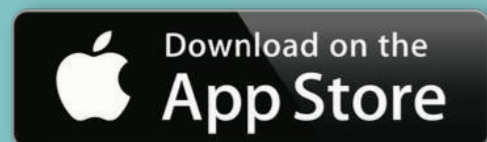


WEALTHAPP  
finance simplified



WELL THEE

Newsletter | Apr' 23



## Message from WealthApp Team

Welcome to the April 2023 edition of WellThee.

We wish you a **Happy Poila Baisakh**



WellThee is for our clients and their stories.

Please share with us stories of success, events and community work that you wish to be published.

Email : [services@wealthapponline.com](mailto:services@wealthapponline.com)

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## “QUOTE OF THE MONTH”

FINANCIAL PLANNING AND DISCIPLINE  
IS KEY TO ONE'S FINANCIAL FREEDOM.

**-KISHORKUMAR BALPALLI**

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### CLIENTS' STORY

Ms. Rukmini Guha

Following are the client stories for this month.



Tan & Loom, a brand manufactured & marketed by our client Ms. Rukmini Guha, has been displayed at Oscars, 2023.



Guneet Monga, Oscar winning producer, at the Paramount Studios, US, was seen carrying a Tan & Loom bucket bag accompanied by Nobel prize winner, Malala Yousafzai. A precious moment for the brand.

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Mr. Navarun Sen

Our client, Mr. Sen, President – Plywood Business, Century Ply and Co-chairperson, Marketing and Brand committee of The Bengal Chamber was part of the exciting Marketing Quiz, 'What's your MQ', presented by Tata Steel. He got featured in the Telegraph. To read in details please click on the below link:

<https://bit.ly/3Zo47ra>



From L-R: Navarun Sen, president - Plywoods Business, CenturyPly and co-chairperson, marketing & brand committee of The Bengal Chamber, Smarajit Purkayastha - deputy director general, The Bengal Chamber of Commerce & Industry and Praveen Shrivastav, chief - marketing & sales, branded & retail products, Tata Steel and co-chair, marketing & brand committee of The Bengal Chamber, at the event.

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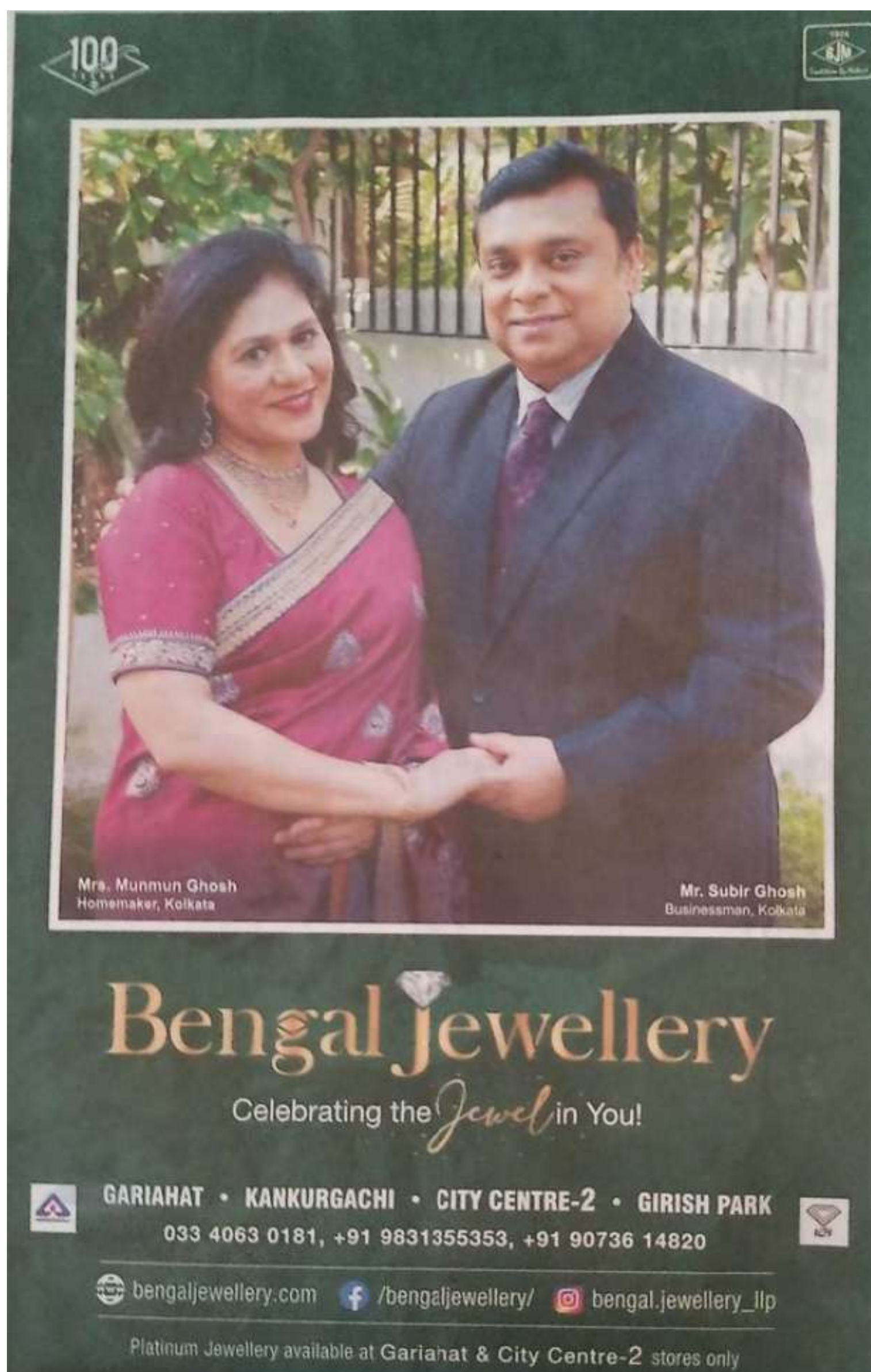


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### Mrs. and Mr. Subir Ghosh



Owner/Managing Director at Unirox Bicycles, Mr. Subir Ghosh and his wife Mrs. Munmun Ghosh got featured in Times of India as model of "Bengal Jewellery".



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LIFE AT WEALTHAPP

### Session on changes in Debt Funds Taxation

There has been a sudden tax change in debt funds. Wealthapp organised a special session exclusively for our clients where they can take advantage of the existing tax rules for new investments done by 31.03.2023.

# CHANGES IN TAXATION OF NON EQUITY MUTUAL FUNDS.

To know more, please join the call on

**MONDAY**  
**27 MAR 2023**  
**4.00 PM ONWARDS**

**EXCLUSIVELY ORGANISED BY OUR PARTNER**

**kotak**  
Mutual Fund

**FOR WEALTHAPP CLIENTS.**

**LIVE ON ZOOM**

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**Debt Mutual Funds – Illustration Of Indexation Benefit – this benefit is available for investment made till 31<sup>st</sup> March 2023.**

	5 Year Traditional Savings Schemes	Debt Index Fund
Investment Amount (INR)	1,00,000	1,00,000
Rate of Return (%) (Assumed)	7.5%	7.5%
Value at Maturity (INR)	143,563	143,563
Interest/Gains for Maturity Period (Rs)	43,563	43,563
Indexation Available	No	Yes
Taxable returns / Gain (Rs.)	43,563	15,935
Tax Liability (Rs)	13,069	3,187
Total Maturity Value after Tax	130,494	140,376
Effective Post Tax Return (CAGR)	5.47%	7.02%

\*Tax Rate considered 30% exclusive of applicable surcharges & cess. \*\* Tax as per LTCG income tax provisions exclusive of applicable surcharges & cess. This computation is based on inflation index assumed at 5% p.a. Fund related expenses ignore for this illustration. Investors are advised to consult their tax advisors for taxation related matters. To be used for informational purposes only. Disclaimer: The above comparison & rate of returns have been given for the purpose of the general information & illustration only. Investments in mutual funds should not be construed as a guarantee of any minimum return. The information set out is neither a complete disclosure of every material fact of the Income-tax Act, 1961 nor does constitute tax or legal advice. Investors should be aware that the fiscal rules/tax laws may change and there can be no guarantee that the current tax position may continue indefinitely. In view of the individual nature of the tax consequences, each investor is advised to consult his/her own professional tax advisor. Investors alone shall be fully responsible for any decision taken on the basis of this document. Source: Income Tax Department, Government of India.

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LIFE AT WEALTHAPP

Naboborsho celebrations from 21-23rd April 2023 at Boi Mela ground

WEALTHAPP will be managing the entire Finance Zone with our partners during the Naboborsho celebrations of Bengal Business Council (BBC) from 21-23rd April 2023 at Boi Mela ground, Karunamoyee Saltlake. Block your dates to be a part of BENGAL RISING 2.0



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### CONTACT DETAILS

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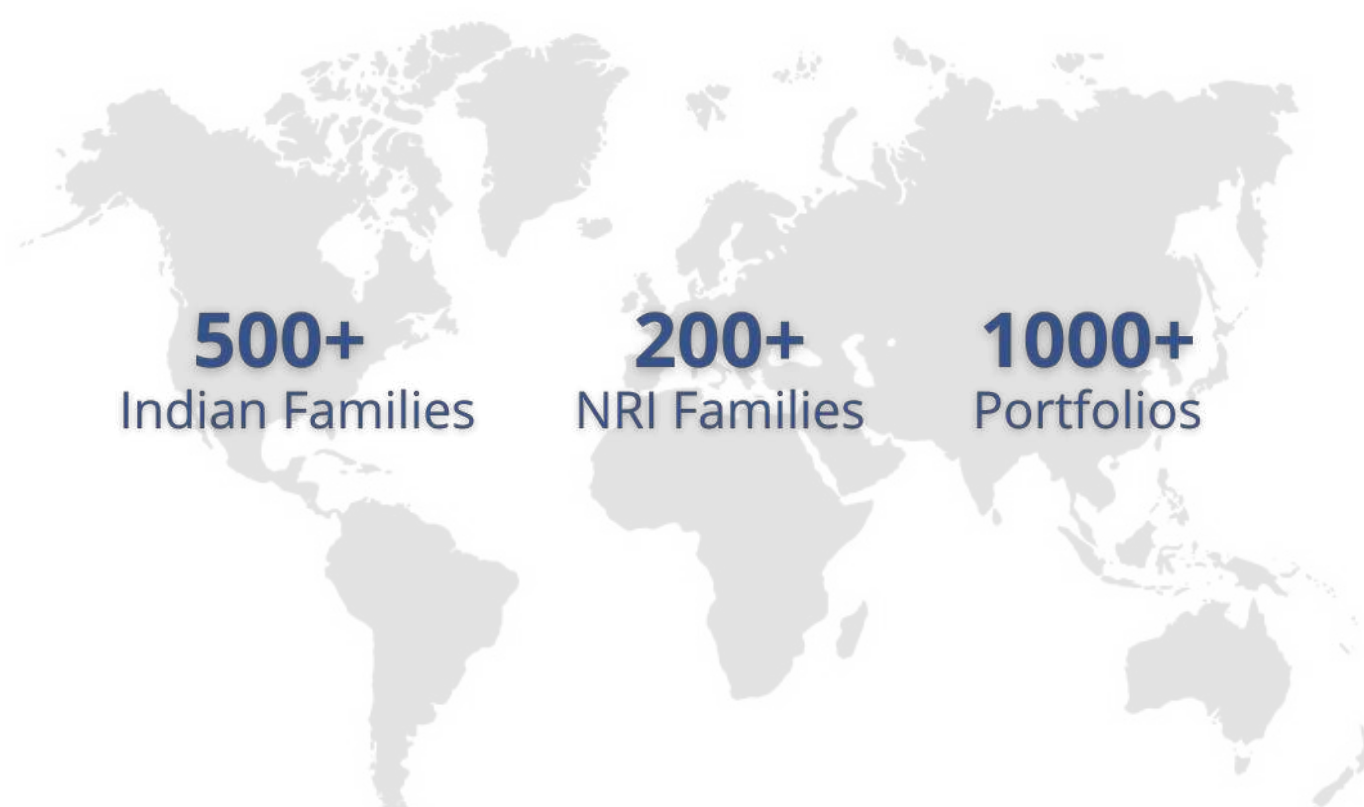
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Presence in Bengaluru, Delhi NCR, Hyderabad, Mumbai, Kolkata and Prayagraj



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