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WELL THEE

Newsletter | **Feb' 24**



Message from **Team WEALTHAPP**

WEALTHAPP turns 10

Welcome to the February 2024 edition of WellThee.

We take great pleasure in honouring our clients and their remarkable stories through WellThee, our monthly e-magazine.

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

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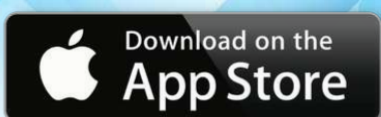
“QUOTE OF THE MONTH”

TIME IS YOUR FRIEND, IMPULSE IS YOUR ENEMY. TAKE
ADVANTAGE OF COMPOUND INTEREST AND DON'T BE
CAPTIVATED BY THE SIREN SONG OF THE MARKET

- WARREN BUFFETT

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WEALTHAPP CLIENTS' STORY

Following are the client stories for this month.

Dr Suddhasattwa Sen

Dr. Suddhasattwa Sen was invited as a Guest of Honour to inaugurate the prestigious "International Photography and Art Exhibition - AURA 2024" organised By Retro Kolkata Arts Forum which saw participants from across the globe.



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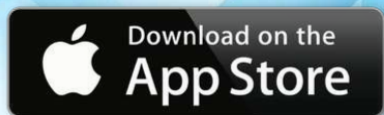
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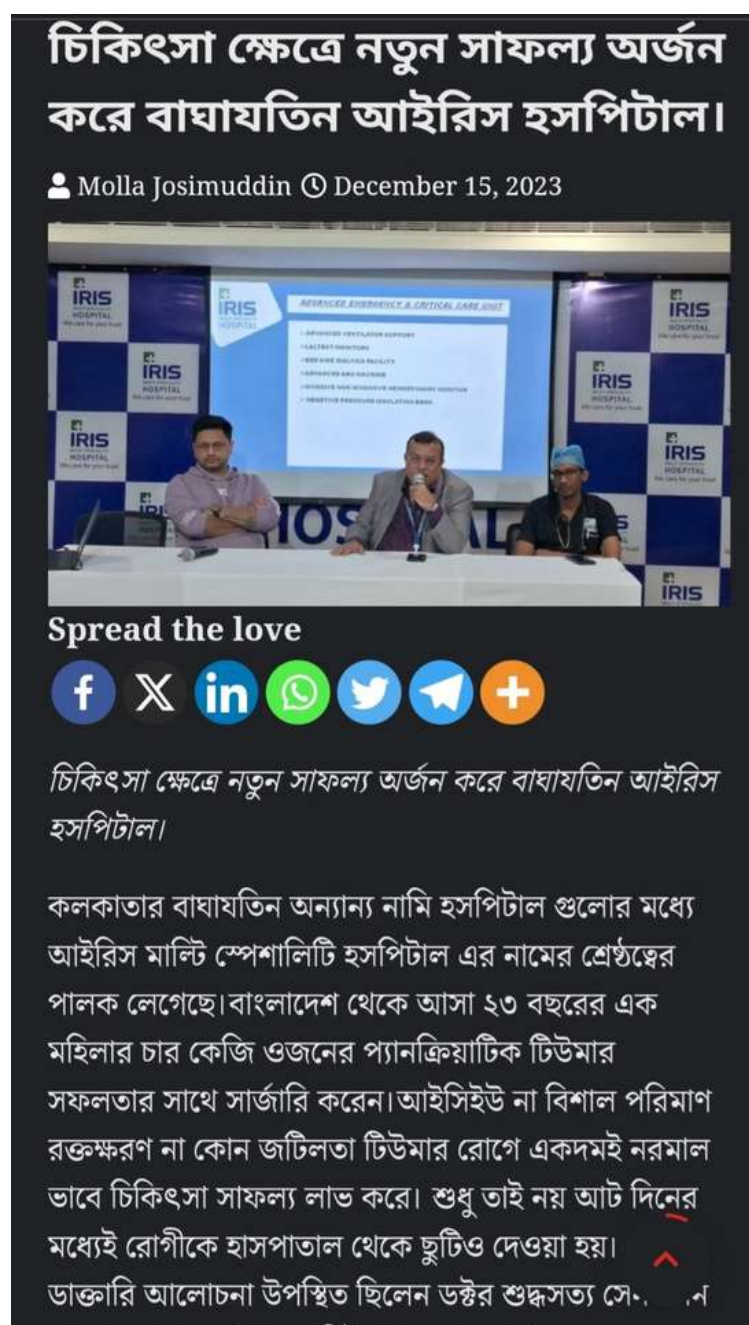
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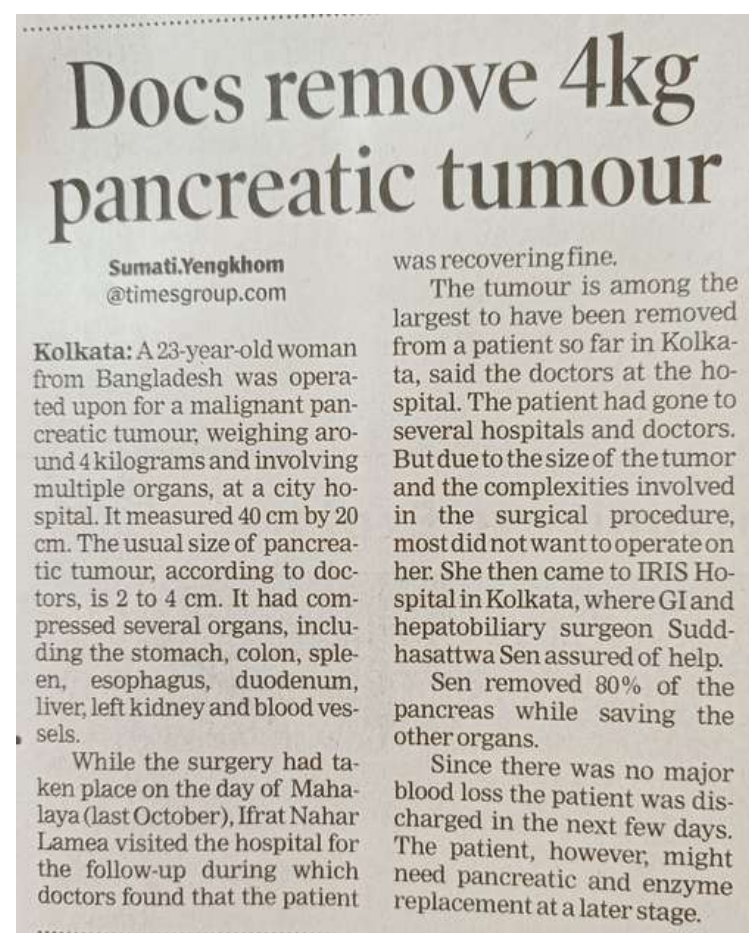
Dr Suddhasattwa Sen (Continued)

Dr. Sen removed Worlds Largest Pancreatic Cancer weighing 4 kgs, successfully. This amazing feat has been covered by various Media Houses.



আইরিস মাল্টি স্পেশালিটি হাস্পিটাল की ओर से गत 15 दिसम्बर को आयोजित एक प्रेस कॉन्फ्रेंस में कहा गया कि एक 23 वर्षीय अंतर्राष्ट्रीय रोगी दुनिया के सबसे बड़े पैन क्रिटिक ट्यूमर 40 सेमी. आकार 20 सेमी. के ऑपरेशन के लिए कोलकाता के इस हॉस्पिटल में डॉ. सुधासत्त्व सेन के पास गया।

जो लगभग 4 किलोग्राम वजन (वेट वजन) का था।
आईरिस अस्पताल, जादवपुर में सर्जरी सफलतापूर्वक की गई और मरीज को केवल 8 दिनों में छुट्टी दे गई।
सफलता की कहानी की यूएसपी:
विश्व के सबसे बड़े अग्न्याशय ट्यूमर प्रकार का ऑपरेशन किया गया। दुर्लभतम ट्यूमर प्राथमिक अग्न्याशय एडेनोकार्सिनोमा ट्यूमर जो 40 सेमी का था. जो अब तक का सबसे बड़ा है, आमतौर पर आकार 2 से 6 सेमी है।
मल्टीऑर्गन में येट ऑर्गन प्रिजर्विंग सर्जरी थी
केवल पैंक्रियाज 80% हटा दिया गया, पेट बृहदांत्र ग्रासनली प्लीहा ग्रहणी को बचा लिया गया, कोई आईसीयू नहीं, कोई बड़ा रक्तपात नहीं। इतने समर्थन के बावजूद कोई जटिलता नहीं। एक बड़ी सर्जरी, रोगी का खान-पान स्थिर, चलना-फिरना सामान्य था।
अन्य सभी. जटिलता के इलाज के लिए बांग्लादेश से अंतर्राष्ट्रीय ने कोलकाता (भारत) की यात्रा की।
आईआरआईएस अस्पताल चिकित्सा पर्यटन के लिए वन स्टॉप विकल्प बन रहा है।



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Mr. Meghdut Roychowdhury



Our client, Mr. Meghdut Roychowdhury, Chief Innovation Officer - Techno India Group was at the World Economic Forum, Davos.



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LIFE AT WEALTHAPP

WEALTHAPP AWARDS

Sudip Chakraborty was awarded Employee of the Quarter (Oct - Dec 2023)



Sudip Das was awarded Employee of the Year (Jan - Dec 2023)

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LIFE AT WEALTHAPP

Kolkata Literary Meet 2024

WEALTHAPP co-sponsored the star-studded Kolkata Literary Meet 2024. It is the biggest literary fest pan-India, spanning over 5 days. Mr. Raghuram Rajan's session was exclusively sponsored by WEALTHAPP and one of the biggest crowd pullers of the event. WEALTHAPP Founder Director, Mr. Soumyajit Ghosh and CEO, Mr. Anindya Paulchaudhuri were part of two esteemed sessions at the KLM 2024.



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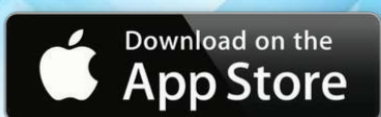
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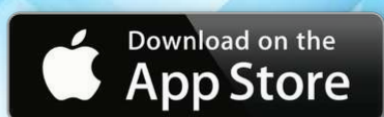
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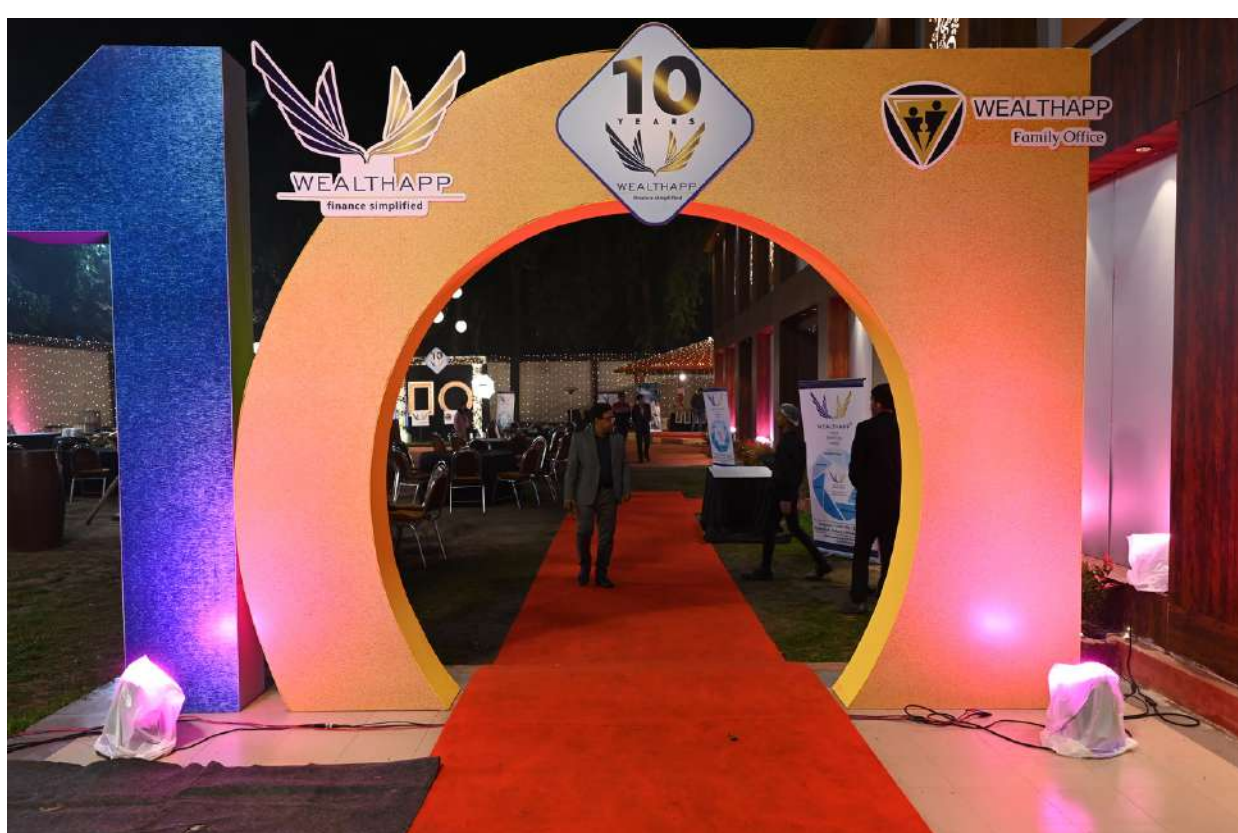
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LIFE AT WEALTHAPP

WEALTHAPP TURNS 10

As WEALTHAPP TURNS 10, clients and various fund houses joined hands in celebrating over dinner and drinks. There were 2 sessions discussing INDIA in 2024.



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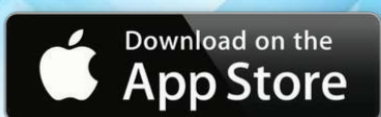
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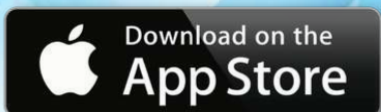
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LIFE AT WEALTHAPP

PRESS COVERAGE

"Being Fearless: Examining Entrepreneurship in the Bengali Community" moderated by Mr. Anindya Paulchaudhuri, CEO - WEALTHAPP, featuring prominent industry leaders from Bengal. Event coverage by the renowned daily, The Telegraph.

Entrepreneurs discuss Bengal's challenges and opportunities

Biz leaders reject acumen perception

DEBRAJ MITRA

Calcutta: Three city-based entrepreneurs rejected a perception on Wednesday — that Bengal lacks business acumen.

"I think this whole notion of different traits of any community is a figment of imagination. I don't think we should think about it. There are going to be real challenges — finding customers, dealing with competitors, finding financing. Let us focus on them," said Rudra Chatterjee, the managing director of Lauxmi Group and the chairman of Obectee.

Chatterjee, Peerless managing director Jayanta Roy, lawyer and managing partner of AQUILAW Sucharita Basu, and banking and wealth management professional Anindya Paulchaudhuri were part of a panel at the Tata Steel Kolkata Literary Meet, in association with Victoria Memorial Hall and The Telegraph.

Paulchaudhuri, the moderator, brought up an often-asked question.

"Do you think that we Bengalis can still be leaders of businesses and we can turn the tide back from where we are now, known as a laid back, 9-to-5 job-centric people," he asked, prompting Chatterjee's assertion.

More important than dwelling in an imaginary world was to identify an opportunity, Chatterjee said.

"Firstly, we have to recognise where we are. We are in a dense consumption market. There are almost 100 million consumers. Whether you want



(From left) Anindya Paulchaudhuri, Sucharita Basu, Jayanta Roy and Rudra Chatterjee launch *Being Fearless*, a book that traces the history of one of India's best-known non-banking financial companies, at the session on Wednesday. "This book is a 20th century story of three visionary bravehearts — Radheshyam Roy, the founder, and his two sons, BK Roy and SK Roy, who catapulted Peerless to new heights and glory," Jayanta Roy, managing director of the company, said. "What makes this story really fascinating is that during their lifetime, there were incidents and events that challenged their very existence. Like the challenges of running a Swadeshi company in the colonial regime, the Partition that forced them to cut off their roots in east Bengal, the first Industrial Policy of 1956 which led to nationalisation and the state enterprises... There were many ups and downs. But the unique thing about them was that they resurrected after every setback," he said. The book has been edited by DN Ghosh, former chairman of the State Bank of India. Picture by Bishwarup Datta

to sell tea or legal services or financial services, if you can attract the consumption in a few hundred kilometres, you have a lot of people who are increasing in purchasing power. You can target them," he said.

He linked the perception problem to Bengal's colonial past.

"Nobody says Mumbai does not have business acumen. There were several Swadeshi businesses in Calcutta but many of the old businesses were British owned. Tea, jute, indigo, managing agencies, all these were run and influenced by the British. The banks were British. We

were in a very European export-oriented ecosystem. The businesses went away."

What was then Bombay, in contrast, had thriving cotton and textile industries.

"Bombay attracted home-grown consumption. Calcutta had the Imperial Bank, Bombay had the stock market,

getting local capital for getting railways to bring cotton. After that, there were many aspects — the Partition, the Communist rule. There are many people who understand these things better than I do. But we have to understand the historical context. Not get weighed down by it but understand," said Chatterjee.

"We should just throw away the figments of imagination of one community as incompetent. Not only about Bengalis but any other community," he said.

Basu said she had noticed a change in her clients in Bengal.

"In the past few years, I have been noticing that Bengali entrepreneurs have been thinking much more aggressively than they did before. There are companies, my clients, which have taken funds, taken private equity, they have grown with the fund, they have had strategic advisors on board. All these elements are very very important in the corporate journey of any organisation. So, it (Bengalis lack business acumen) is just a perception. I am sure we are looking at an exciting decade," she said.

Roy gave his company's example.

"We have treated entrepreneurship like engineering, continuously reinventing ourselves with policy decisions and moving ahead. Things are changing very fast. The colonial hangover has taken some time to go away. The pace of change will accelerate in this decade," he said.

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PRESS COVERAGE

The Telegraph, Business : Monday, 29th January 2024

Click to read the full article : <https://bit.ly/3SDRkRm>

Wealthapp AUM goal: Rs 2,500cr

A STAFF REPORTER

Calcutta: Wealthapp, a wealth management company, has set its sight on expanding its assets under management to Rs 2,500 crore by 2025.

"Our current AUM is about Rs 950 crore and our target is to reach Rs 2,500 crore by 2025. We started with a small setup in Calcutta in 2014," Anindya Paulchaudhuri, partner and group CEO, Wealthapp, said.

"Now, we are present in seven cities with a 30-member team and serve around 1,500 families globally, including a substantial NRI clientele," he said.

"Our approach is to undertake financial planning for our client and offer goal-based solutions. We suggest those products that would suit the risk profile of the individual."

"When top executives from large Indian private sector corporations across the manufacturing and services sector retire, they are referred to us for wealth management," Paulchaudhuri, who held senior leadership roles in ABN AMRO, Standard Chartered and DBS Bank, said.

Wealthapp has diversified into family office business, broadening its services to include legacy, estate planning and tax advisory services.

Wealthapp was founded in 2014 by Soumyajit Ghosh, with an investment background at ANZ, ABN Amro and Citigroup.

"We are grateful for the trust and confidence our clients have placed in us over the past decade. As we look ahead, we remain dedicated to our core values of integrity, transparency and client satisfaction," Ghosh said.

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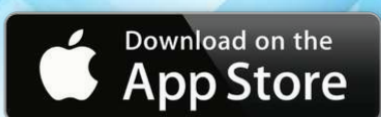
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WEALTHAPP Holiday Adda

As WEALTHAPP stepped into the 10th year in 2024, we have launched our weekly WEALTHAPP er Adda on YouTube, to celebrate our clients and their stories. This month we are sharing the adda with our clients, MR. GAURAV GANGULY, MR. NEELKANTH CHATTERJEE, MR. BABLU HAIT, MR. DEVASIS GHOSH AND MR. UDAY GANGULY.

We will share more such interesting client stories every weekend.

You can watch this month's Holiday Adda by clicking on the following videos.



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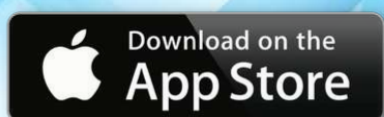


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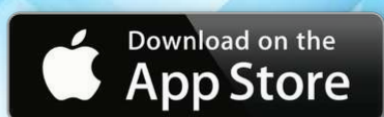
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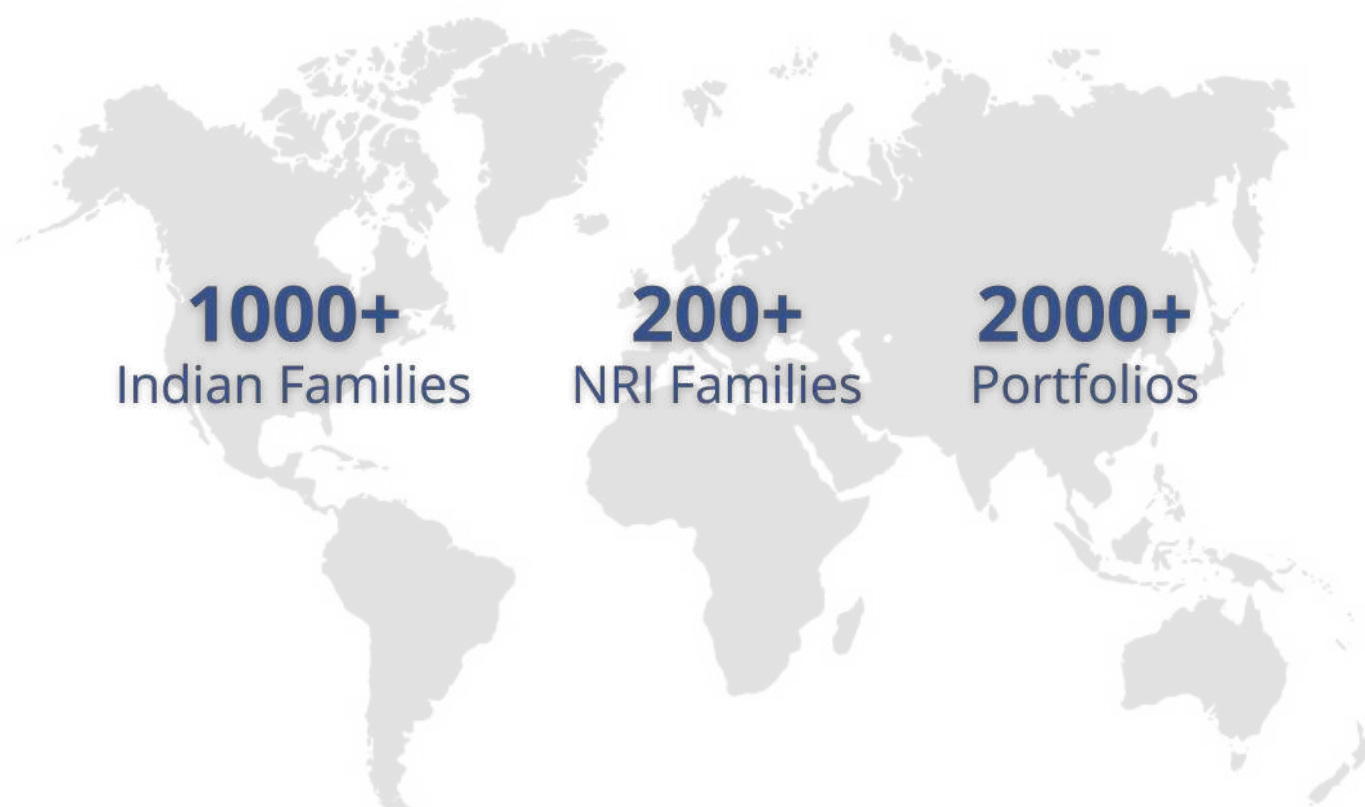


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