# Valuefy marks 15 Years with the Launch of Next-Gen WealthTech Platform, Redefining Global Wealth Management

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Valuefy, a global leader in WealthTech innovation, commemorated its 15-year journey with the launch of its allnew, fully integrated WealthTech platform, designed to transform the way wealth managers engage with clients, harness data, and scale operations. The announcement was made at a landmark event held at the prestigious MCA Club, Mumbai, attended by 100+ prominent wealth management leaders, industry veterans, and partners including the likes of Mr. Nilesh Shah, Kotak Mutual Fund, Mr. Ashish Chanda Avendus, Mr. A Balasubramanium, MD & CEO, Aditya Birla Mutual fund, Mr. Ashok Suvarna, CEO, Aditya Birla Money, Sankaran Naren, ED and CIO, ICICI Prudential Mutual Fund, Sandeep Das, MD and CEO Centrum.



### Launch Event of Valuefy at MCA Club Mumbai

Valuefy, an established and trusted technology partner to leading banks, wealth managers, and family offices worldwide unveiling the next-generation product suite marks a bold leap forward, offering AI-powered analytics, seamless client engagement tools, intuitive dashboards, and end-to-end wealth management capabilities-all within a unified platform.

# A Night of Innovation, Insight, and Inspiration

The celebration brought together **industry icons and thought leaders** to explore the evolving future of wealth management in a technology-driven era.

# AI and the Future – Keynote by Srikanth Velamakanni, Founder, Fractal.ai

Srikanth, a globally respected leader in AI and analytics, delivered a powerful keynote on the transformational role of AI in financial services. He emphasized how data-driven intelligence and machine learning will enable wealth managers to deliver hyper-personalized client experiences and gain a strategic edge in an increasingly competitive market.

# Fireside Chat — Lessons from Cricket for the Corporate World

Legendary commentator Harsha Bhogle engaged in a riveting conversation with Vivek Singal, Co-Founder, Valuefy, drawing parallels between cricket and business. From decision-making under pressure to team dynamics, Harsha offered unique insights for leadership and strategy in corporate settings.

# Product Showcase - Presented by Sharad Singh, Cofounder, Valuefy

Sharad introduced the all-new, fully integrated WealthTech platform, purpose-built for global wealth managers. With an emphasis on scalability, efficiency, and client-centricity, the platform offers an end-to-end solution-from onboarding and portfolio management to analytics, reporting, and personalized client engagement.

## Vivek Singal on the Milestone Launch:

"This is more than a celebration-it's a reflection of the trust our clients have placed in us over 15 years. Our new platform embodies our vision for the future: enabling wealth managers to work smarter, engage better, and scale faster in a digital-first world."

# **About Valuefy**

Founded in 2010, Valuefy is a leading WealthTech platform that empowers banks, wealth managers, and asset managers with AI-powered solutions for smarter decision-making, superior client engagement, and scalable growth. With a global client base, Valuefy is at the forefront of driving digital transformation in the wealth management industry.

Learn more at <a href="https://www.valuefy.com">www.valuefy.com</a>