

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

Category: Business

written by News Mall | March 21, 2025



Valuefy, a global leader in WealthTech innovation, commemorated its 15-year journey with the launch of its all-new, 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 Balasubramaniam, 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, Co-founder, 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 www.valuefy.com

