



EDUCATE. EMPOWER. ENRICH

Fixity Edge & Wealth Tree Group

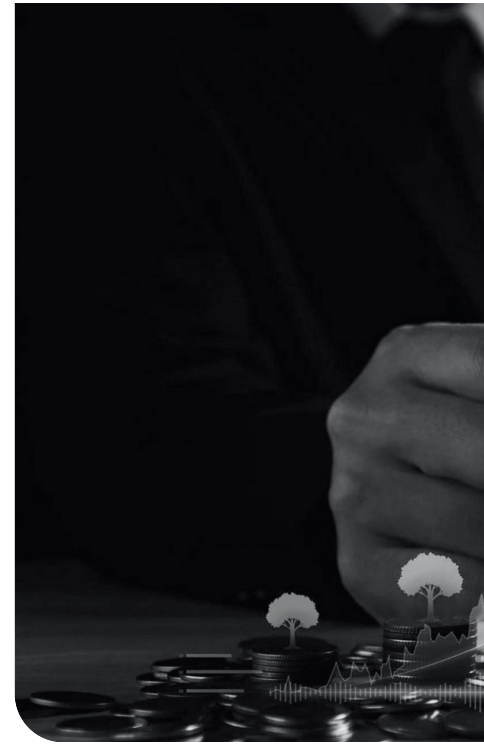
Integrated Financial Planning, Protection & Market Advisory

We partner with individuals, families, and businesses to build **lasting financial security and sustainable wealth** through **research-driven, goal-based financial strategies** that seamlessly integrate protection, investments, and market participation.

Fixity Edge

Fixity Edge is our specialized advisory vertical focused on risk management and general insurance solutions for companies, along with business insurance and financial structuring solutions for corporates.

We design robust protection frameworks combined with efficient tax-aligned strategies, cash-flow optimization, and contingency planning, enabling businesses to safeguard operations while strengthening long-term financial resilience.



SERVICES AND PRODUCTS

1

Insurance Products

Life, Health & General Insurance Solutions for Companies & individuals

2

Investment Products

Mutual Funds--Debt & Equity funds for short & Long term Solutions

3

Structured Products

PMS - Portfolio Management Services
AIF - Alternative Investment Funds

4

Portfolio Advisory

Portfolio Restructuring & Personal Advisory

5

Research Services

Fundamental & Technical Research for investors & Traders

6

Broking Services

Retail, HNI, Algo & Automated Trading plot forms

7

Financial Planning

Risk, Investment, Tax Planning Solutions for Individuals & Companies

8

Training

Fundamental & Technical Analysis Modules for Traders & Investors



FIXITY EDGE
SECURE. STRUCTURE. SCALE.



EDUCATE. EMPOWER. ENRICH

What We Do



Goal-Based Financial Planning

Comprehensive income analysis, life-goal mapping, structured financial roadmaps, and periodic strategy reviews.



Life & General Insurance Planning

Scientific insurance need analysis, optimal coverage design, and ongoing policy reviews as financial goals evolve.



Mutual Funds & Long-Term Wealth Creation

Research-driven fund selection, SIP-based investing, portfolio reviews, and disciplined rebalancing.



Stock Market Advisory (A SEBI-Certified Research Firm)

Market and sector research with actionable insights to support informed and confident investment decisions.

Our Advisory Philosophy

Personalized & client-centric approach

Integrated advisory across insurance, investments, & risk management

Transparent communication and ethical processes

Continuous alignment with changing markets and life goals

Why Choose Us



Over 30 years of proven market experience



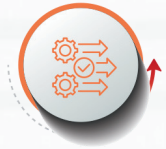
Research-led, goal-focused advisory framework



Integrated expertise across insurance, investments, & capital markets



Relationship-driven model, not product-driven selling



End-to-end support from planning through execution

Our Commitment

We don't merely offer financial products.

We build **long-term financial partnerships** focused on:



Protecting Your Present



Planning Your Future



Growing Your Wealth Sustainably

Partner with **Wealth Tree Group & Fixity Edge** to create financial stability today and generational wealth for tomorrow.

Fixity Edge & Wealth Tree Group operate an **integrated advisory model** combining insurance, investments, and market research.

Our strength lies in **client retention, recurring advisory relationships, and cross-service engagement.**

With a strong foundation in protection-led planning and scalable advisory verticals, we are positioned for **steady, compliant, and sustainable growth.**



USA | INDIA | MEXICO