

Studio Agentic AI

Next-Gen Wealth Creation -
Predictive, proactive, &
personalised

Data-Driven Clarity, Expert-Led Decisions



66%

of investment firms
believe AI improves
their risk management
processes.



40% wealth-management clients say managing wealth has become more complex in the last two years

The Investment Landscape

India's venture capital, private equity, and family office ecosystem is maturing rapidly. Despite global market slowdowns, India remains a top destination for high-growth investments. Technology-led sectors (fintech, SaaS, consumer tech) dominate, while emerging sectors like semiconductors and renewable energy are poised for growth.

Investor participation is broadening: PE firms, family offices, and corporate VC arms are deploying larger capital pools, while India's ultra-high-net-worth segment is expanding rapidly.

These shifts create both opportunities and complexities, demanding sophisticated wealth management platforms and expert-led solutions across financials, governance, and compliance.

Current Need



Investor Needs Today →

01

Deep and real time financial analysis for investment decisions.

02

Risk management and regulatory compliance.

03

Robust corporate governance frameworks.

04

Operational and portfolio support for performance optimization.

05

ESG and sustainability integration.

Investor Needs Tomorrow →

01

Complex cross-border investments and exits.

02

Advanced ESG and impact measurement.

03

AI governance and ethical oversight.

04

Audit automation and digital asset oversight.

05

Strategic fund structuring for new asset classes (cryptocurrency, tokenized assets).

What if you could
cut deal evaluation time by 60%
and spot risks before they surface – all in one
platform?

We are assisting investment decisions
**faster, smarter, and future-ready – powered
by Deep tech Platform + Expert led solutions.**

Studio **Agentic AI**

Your Deep tech platform for Financial, Governance and Compliance intelligence

Studio Agentic AI

Next-Gen **Wealth Creation** Platform

Studio AI delivers trusted data, financial insights, and grc intelligence to CXOs,
VCs, and decision-makers.

Get Started

Studio AI works with leading startups, VCs, and corporates.

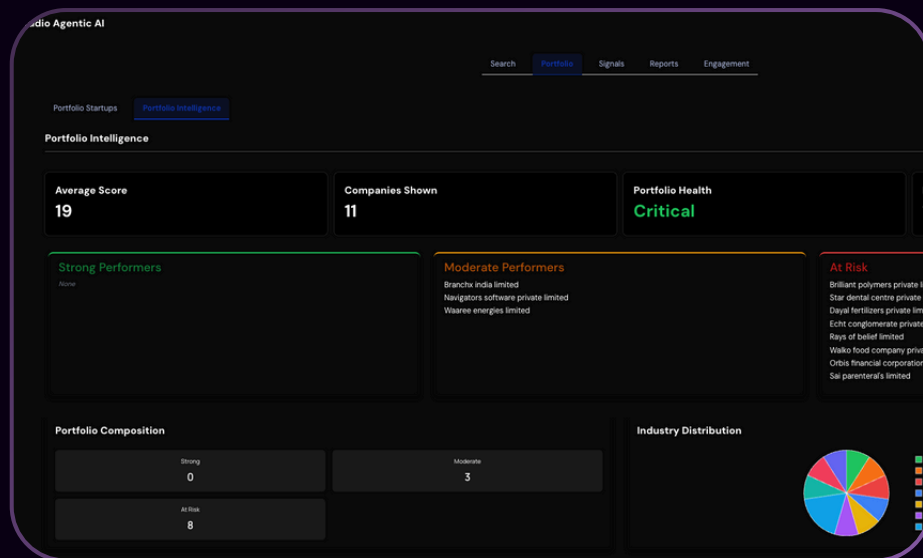
GVK

Nykaa

Ola

Zoho

The one-stop Platform for Investors



01

Comprehensive Search:
Instant company searches with financials, compliance status, and risk signals.

02

Portfolio
Real-time portfolio, financial, compliance and regulatory health.

03

Real time signals:
Live alerts on risks, anomalies, and market movements.

04

Automated Reports:
Periodic system generated reports on metrics driving financials, compliance & risk.

05

Engagement:
Request expert intervention, track progress, and manage deliverables seamlessly.

What Sets Studio AI Apart



Data In → Trusted Sources

Financials, compliance, governance & market data processed & integrated in one place.

AI Insights → Quick Decisions

Benchmarks, risk flags and action items generated in real time.

Expert Layer → Better Judgement

Experts validate insights, add context, and refine strategy.

Personalized Dashboards → Easy Monitoring

Track portfolio health, compliance, and risks live with continuous monitoring.

Action → Board-Ready Deliverables

Instant reports and summaries tailored for investors and decision-makers.

Transforming decisions with deep domain expertise and Consulting Excellence



50 Years of Trusted Expertise



Clients

Trusted by 2000+ businesses, investors & institutions worldwide.

Countries / Presence

Global footprint across 90+ countries, with strong local expertise.

Solutions Delivered

10,000+ financial, compliance & governance solutions executed.

Network

A 50-year legacy network of experts, advisors & partners.

Finance & Capital Solutions

Our financial advisory helps investors maximize returns, optimize capital allocation, and make informed investment decisions.

List of Solutions	What It Covers
1. Investment due diligence and Risk Audits	Modeling, market scan, risk check
2. Capital Readiness & Investor Documentation	Benchmarking, Capital restructuring
3. Valuation and Business Structure	Valuation, ESOPs, Step-up & Step-down subsidiaries
4. Capital and Financial Restructuring	Fund setup, Pre IPO & IPO support, capital structures
5. Outsourced CFO services	MIS Dashboarding, Strategic Finance support, Payroll & Statutory Fillings, Bookkeeping

01

Investment

Due Diligence and Risk Audits

Comprehensive financial modelling: revenue, margin, cash flow, and capex projections

Market and competitor analysis: Competitor benchmarking & scenario planning

Risk assessment: Operational, financial & strategic risk evaluation

Deliverable: →

Detailed Due Diligence Report: Financial, market, and risk insights to support investment decisions.

Outcome: Clear go/no-go recommendations with risk-mitigation pathways.

02

Capital

Readiness & Investor Documentation

Performance benchmarking:

Compare across portfolio companies

Restructuring Support:

Operational and financial restructuring advice to improve efficiency.

Capital allocation:

Optimize cash, debt & equity mix

Deliverable: →

Portfolio Optimization Plan: Benchmarks, restructuring, and capital strategy tailored to portfolio performance.

Outcome: Roadmap with ROI projections and efficiency improvement steps.

03

Valuation & Business Support

Valuation Models: for investment, M&A, or exit scenarios.

Financing Structures: Equity, debt, or hybrid financing to maximize returns.

Deal Advisory: Deal term advisory, including negotiation support and scenario modeling.

Deliverable: →

Transaction & Valuation Blueprint: Valuation models, financing structures, and deal term advisory.

Outcome: Negotiation-ready transaction plan with valuation justification.

04

Capital & Financial Restructuring

Fund formation: Guidance on SEBI AIFs & cross-border structures.

Gift City and International Investment Planning

Pre-IPO & IPO Support: IReadiness assessments, documentation guidance, and investor positioning for listings.

Capital Structure Advisory: Designing optimal equity, debt, or hybrid structures aligned with growth and liquidity timelines.

Deliverable: →

Capital Readiness Roadmap: Strategic guidance across fund setup, capital structuring, and IPO preparedness.

Outcome: Investor-ready toolkit including fund model, capital structure plan, and listing pitch materials.

05

Outsourced CFO solutions

Bookkeeping: Maintenance of accounts, reconciliations, and financial statements.

Payroll & Statutory Filings: Salary processing with accurate tax deductions and timely regulatory compliance.

MIS Dashboarding: Periodic dashboards showing key financial metrics for quick decision-making.

Deliverable: →

Market Intelligence Report: End-to-end CFO support including updated books, compliant filings, and regular MIS reports.

Outcome: Ensures financial accuracy, regulatory adherence, and timely insights to guide strategic business decisions.

Client Feedbacks

" Their due diligence saved us from a risky deal. Clear, structured, and to the point. "

— Managing Partner, VC Fund

" Fundraising was smoother with their strategy and pitch support. Investors were impressed. "

— Principal, Family Office

" Their portfolio strategy brought discipline to our capital allocation. ROI improved within the first quarter. "

— CFO, Mid-Market Enterprise

Sample Use Cases

VC Portfolio Assessment:

Conducted detailed scenario analysis for a fintech startup, helping the VC make an informed Series A investment.

PE Portfolio Optimization:

Restructured a mid-market e-commerce company's capital and operational strategy, increasing profitability by 18%.

Family Office Strategic Allocation:

Designed sector-specific investment plans for a renewable energy initiative, balancing financial returns with sustainability goals.

Governance, Risk & Compliance (GRC) Solutions

Our GRC services ensure portfolio companies operate within regulatory frameworks, mitigate risks, and adopt governance best practices, giving investors confidence and reducing exposure.

List of Solutions	What It Covers
1. Regulatory & Legal Compliance	SEBI, RBI, FEMA, tax, KYC/AML
2. Corporate Governance Structuring	Board policies, Governance norms & Contracts
3. Enterprise Risk Management	Risk Mitigation, Disaster Recovery, Process Risk assessment
4. ESG & Sustainability Advisory	ESG integration, impact reporting
5. Cybersecurity & Data Governance	Digital assets, data protection, response

01

Regulatory & Legal Compliance

Regulatory Adherence: Ensure compliance with SEBI, RBI, FEMA, tax, and sector-specific norms.

KYC & AML Support: Robust identity checks, AML frameworks, and FVCI registration support.

Cross-Border Compliance: Guidance on international investments, approvals, and reporting.

Deliverable: →

Compliance Framework: Covers SEBI, RBI, FEMA, tax, and KYC/AML.

Outcome: Clear compliance pathway, reduced regulatory risk.

02

Corporate Governance Structuring

Board Frameworks: Draft board charters, voting protocols, and governance policies.

Stakeholder Agreements: Build clear shareholder agreements and rights frameworks.

Independent Oversight: Appoint independent directors and strengthen decision transparency.

Deliverable: →

Governance Roadmap: Board structures, agreements, independent oversight.

Outcome: Stronger governance, higher investor confidence.

03

Enterprise Risk Management

Risk Identification: Map financial, operational, market, and cyber risks.

Mitigation Strategies: Design frameworks to minimize exposure and business disruption.

Monitoring & Reporting: Build dashboards for ongoing board-level oversight.

Deliverable: →

Risk Dashboard: Risk mapping, mitigation, and monitoring tools.

Outcome: Proactive control with board-level visibility.

04

ESG & Sustainability Advisory

Policy Integration: Embed ESG standards into investment and portfolio management.

Impact Assessments: Conduct climate, social, and governance reviews aligned to SEBI BRSR.

Sustainability Reporting: Build measurable ESG reporting frameworks for transparency.

Deliverable: →

ESG Report: ESG integration with climate and social assessments.

Outcome: Measurable impact aligned to SEBI BRSR.

05

Cybersecurity & Data Governance

Digital Asset Review: Assess IT infrastructure, policies, and digital resilience.

Incident Preparedness: Develop incident response and remediation playbooks.

Data Protection: Strengthen compliance with privacy and security standards.

Deliverable: →

Cyber Risk Report: Digital asset review, data governance, incident readiness.

Outcome: Enhanced resilience and faster response to threats.

06

Internal Audit & Controls

Control Reviews: Evaluate financial, operational, and compliance control systems.

Audit Automation: Introduce AI-enabled monitoring for continuous assurance.

Process Improvements: Recommend enhancements for efficiency and accountability.

Deliverable: →

Audit Report: Control reviews with AI-enabled monitoring

Outcome: Improved efficiency and audit-ready compliance

Client Feedbacks

"Compliance was no longer a bottleneck. Their framework made filings smooth and accurate."

— COO, Fintech Startup

"Risk dashboards highlighted exposures we had missed. It changed how our board monitors risks."

— Risk Head, PE Portfolio Company

Sample Use Cases

"Our board structures were informal before. Their governance roadmap made us investment-ready."

— Founder, VC-backed Tech Firm

Cross-Border Regulatory Compliance:

Guided a US institutional investor through India's FDI/FEMA approvals for an acquisition.



ESG Integration:

Assisted a PE fund in aligning portfolio reporting with SEBI's BRSR disclosures, enhancing investor transparency.



Governance Overhaul:

Implemented independent board structures and formalized voting procedures for a VC-backed tech startup.



Cybersecurity Audit:

Conducted vulnerability assessment and designed multi-layered defense for a fintech portfolio company.



Tech & Innovation Hub

An integrated solution for technology intelligence and IP services, helping organizations track emerging trends, scout innovations, analyze competitors, and protect intellectual property.

List of Solutions	What It Covers
1. Technology Landscape Mapping	Emerging Tech, White-space. Roadmaps
2. Innovation Scouting & Trend Forecasting	Startups, Breakthroughs, Trends
3. Competitor & Collaboration Insights	Competitor R&D, Benchmarking, Partnerships
4. Research & IP Intelligence Solutions	Research Signals, Licensing, Valuation
5. IP Filing & Protection Services	Patents, Trademarks, Copyrights

01

Technology Landscape Mapping

Emerging Technology

Tracking:

Continuous monitoring of new research, patents, and market signals.

Technology Readiness

Assessment:

Evaluation of maturity levels and commercialization potential.

Opportunity Gap Analysis:

Identification of under-served markets and white-space opportunities.

Deliverable: →

Technology roadmaps, opportunity white-space identification, emerging research cluster analysis.

Outcome: Helps organizations identify growth opportunities and prioritize future-ready investments.

02

Innovation Scouting & Trend Forecasting

Startup Ecosystem Scouting:

Mapping promising startups and spin-offs across geographies.

Trend Signal Analytics:

AI-driven analysis of research papers, funding data, and social chatter to detect early trends.

Disruption Scenario Planning:

Building scenarios for potential market shifts and breakthrough technologies.

Deliverable: →

Startup scouting reports, trend forecasts, disruption alerts..

Outcome: Equips decision-makers to spot early-stage innovations and prepare strategic responses.

03

Competitor & Collaboration Insights

Competitor R&D Intelligence:

Tracking patents, funding rounds, and product pipelines of key players.

Partnership Opportunity

Mapping: Identifying strategic partners, alliances, or licensing prospects.

Innovation Benchmarking:

Comparing innovation investments and outcomes across peer groups.

Deliverable: →

Competitor R&D tracking, partnership opportunity lists, collaboration heatmaps.

Outcome: Enables smarter strategic moves by benchmarking against peers and identifying high-value allies.

04

Research & IP

Intelligence Solutions

Freedom-to-Operate (FTO)

Studies: Assessing patent landscapes to avoid infringement risks.

Licensing & Valuation Analysis:

Evaluating IP portfolios for licensing deals and asset valuation.

Research Collaboration

Insights: Identifying leading academic and corporate research clusters.

Deliverable: →

Research activity intelligence, freedom-to-operate studies, licensing and valuation insights

Outcome: Provides evidence-based guidance for commercialization, compliance, and risk reduction.

05

IP Filing & Protection Services

Patent Drafting & Filing

Support: Preparing and submitting patent applications in multiple jurisdictions.

Trademark & Copyright

Services: Securing brand identity and creative assets globally.

Portfolio Management &

Renewal: Tracking deadlines, renewals, and global filing strategies.

Deliverable: →

Filing and prosecution support, filing status dashboards, international filing strategies, and compliance management.

Outcome: Safeguards innovations and brand assets, creating a foundation for licensing and commercialization.

Our Clients



Our Ecosystem

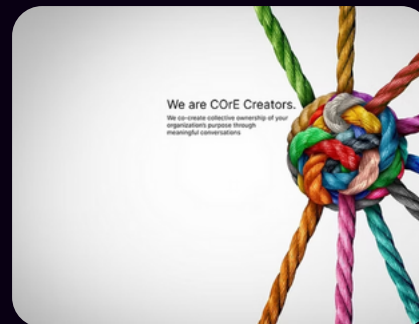
Our Ecosystem connects you to a powerful network of trusted partners, industry experts, and deep domain knowledge — all designed to amplify your AI journey and unlock real-world impact.



ECOVIS RKCA



INCUBIG



CORE CREATORS



IIT ALUMINI COUNCIL

How we add Value



AI Platform

Insights are generated by advanced analytics and interpreted by domain experts.

70% of firms using AI report faster investment decisions.



Human Expertise

Financial advisory, GRC, ESG, and strategic support in one platform.

9 in 10 investors say expert advice is critical for complex deals.



Future Focused

Scalable solutions designed to meet evolving market trends and investor needs.

40% of global assets will integrate ESG factors by 2030.

Pricing Table



Intelligence Dashboard (Financials + GRC)

Your always-on command center for financial health, compliance, and governance.

- ✓ Real-time analytics & alerts
- ✓ Automated board-ready reports
- ✓ Multi-user secure access

From \$X,XXX / year



On-Demand Solutions

Quick, project-based insights when you need answers fast.

- ✓ Focused research briefs
- ✓ Risk & compliance reviews
- ✓ Innovation or market scans

From \$X,XXX / project



Advisory & Consulting

Deep expertise across Finance & Capital, Tech & Innovation, and GRC

- ✓ Strategic roadmaps & action plans
- ✓ Leadership workshops & training
- ✓ Retainer or monthly models

From \$XXX / month



Our Management Team



Dheeraj Rathi

*Founder - Finance and
Capital*



Bharat Mishra

*Co-founder - Technology
Integration & Support*



Ankit Lekhra

*Co-founder - Tech Enablement &
Guidance*



Pankaj Bhargava

*Expert - Strategy and
Performance*



Ram Verma

*Expert - Governance, Risk &
Compliance(GRC)*



Sanjeev Bindal

*Expert - Legal & Regulatory
Advisory*

Get in Touch

Studio Agentic AI – Where Intelligence Meets Expertise.

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[Consult Our Experts](#)

studio Agentic AI

Next-Gen Wealth Creation Platform

Studio AI delivers trusted data, financial insights, and grc intelligence to CXOs, VCs, and decision-makers.

[Get Started](#)

Studio AI works with leading startups, VCs, and corporates.

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