



Newsletter

Q3 2026

#ARIATRULYCARES

BECOME A MEMBER

CONTACT US

॥ श्रीगणेशाय नमः ॥



Chairman's note AMIT KUKREJA



Dear Members,

As Chairperson, it is an honour to share key updates on our progress and strategic direction as I reflect on ARIA's journey. When we look at ARIA from the balcony view it is clear that what sometimes appear to be temporary roadblocks are often catalysts for outcomes far greater than originally planned. Zooming out reveals steady, impactful progress across our regulatory advocacy, industry partnerships, and organizational governance.

1. Deepening SEBI Engagement

ARIA's advocacy team has continued its close, sustained work with SEBI. We've begun work to improve the online process for new RIA applications, and recently met SEBI Whole-Time Member Mr. Sandip Pradhan to present our recommendations — identifying 27 specific bottlenecks affecting the growth of the RIA profession. Separately, a SEBI working group reviewing RIA-versus-MFD regulations received data-backed recommendations from four ARIA Board directors to improve the landscape of practicing advisors and distributors. ARIA also submitted a proposal to the Joint Parliamentary Committee to improve the recovery process for unclaimed investor assets and ease of doing business for IA firms, under the Corporate Law Amendments 2026. Through this sustained engagement, we're ensuring the RIA voice isn't just heard, but actively shapes the regulatory fabric of our financial markets.

2. Strategic Partnership Renewals

We're delighted to announce the renewal of our partnerships with 7 esteemed organisations for this financial year: Franklin Templeton, HDFC Mutual Fund, ICICI Prudential Mutual Fund, Kotak Mutual Fund, S&P Dow Jones, SBI Mutual Fund, and UTI Mutual Fund. We're deeply grateful for their continued support of our mission over the years. This alignment translates directly into stronger infrastructure, deeper research capability, and higher practice standards for our members.

3. NISM Quiz Champions & Industry Recognition

ARIA secured First Place at the inaugural NISM Quiz for Securities Market Entities (QSME 2026), held on 25th July 2026 at the MCA Recreation Centre, BKC, Mumbai — competing against 18 teams from across the securities ecosystem, including BSE, NSE, CRISIL, and AMFI. Congratulations to our Board Members Lovaii Navlakhi and Suresh Sadagopan, who represented ARIA and brought this recognition home. This is a proud moment not just for ARIA, but for the entire RIA profession.

4. ARIA Board Elections — Strong Member Participation

Six director positions on the ARIA Board are open for election this term, and we're proud to share that we received 17 applications — a strong signal of the growing energy and engagement within our community. Board turnover, with a healthy cooling-off period for outgoing members, keeps ARIA's leadership refreshed and its mission moving forward with new perspective. Election and AGM details will be shared shortly by the ARIA Office — we encourage all members to stay engaged as this process unfolds.

5. Honouring Our Outgoing Leaders

We extend our deepest gratitude to four retiring ARIA directors, whose combined contributions have shaped this association's journey. Among them, founding directors, Lovaii Navlakhi and Harsh Roongta played a phenomenal role in fundraising, regulatory advocacy with SEBI & BSE,

shaping ARIA's founding vision & organizational structure, and mentoring generations of volunteers — a foundational part of ARIA's history. We are equally grateful to Tarun Birani, who led our New Members Committee through awareness sessions, workshops, and RIA clinics, and to Shailendra Kumar, whose technology expertise drove the revamp of the ARIA website and strengthened our advocacy initiatives - including contributions to consultation papers and IA Industry Standards Forum (ISF).

As we transition to a board with six incoming directors, we carry forward a clear mandate: scale our impact, launch new member-enablement programs, deepen our engagement with stakeholders, and continue building lasting value in the lives of Indian investors.

Thank you to every board member, volunteer, and partner who made this quarter's wins possible. Your dedication is what makes ARIA a force to reckon with. Let us move into this next chapter with sharp focus and a shared commitment to building financial security and prosperity for investors across India.

Wishing you and your families a very Happy Ganesh Chaturthi.

Warm regards,

Amit Kukreja

Chairperson, Association of Registered
Investment Advisers (ARIA)



Note of Gratitude to the Outgoing Director



Recognising Harsh Roongta's Contribution to ARIA



Harsh Roongta has been associated with ARIA since its early days as a founding Board member and has played an important role in shaping the Association and strengthening its voice within the investment advisory community.

He served as Vice-Chairperson in 2021–22 and Chairperson in 2022–23, providing leadership during ARIA's formative years and helping strengthen its role as the representative body for Investment Advisers. Harsh has made significant contributions to advocacy for RIAs serving on the Advocacy Committee across multiple years and contributing to regulatory representations, analysis of industry trends, responses to SEBI consultation papers, efforts towards easing regulations for RIAs, and ARIA's recommendations for the Union Budget 2027–28. He has also maintained an active dialogue with regulators and key stakeholders.

He has contributed to several important initiatives, including ARIA Truly Cares and the white paper "Reimagining Nominations – Making Succession Smoother and Simpler." He also played a key role in the World Investor Week event for the inauguration of the Syntoniq Risk Profiling Tool by former SEBI Chairperson Madhabi Puri Buch. Apart from Advocacy, he has also been a part of Accounting Finance and new membership committee.

A regular speaker and contributor to ARIA's learning initiatives, Harsh has conducted and participated in sessions on NRI investments, taxation, practice management and future-proofing RIA practices, sharing practical insights and experience with members.

ARIA sincerely thanks Harsh for his leadership, guidance and enduring contribution to the Association. His role as one of ARIA's early leaders, particularly in advocacy, professional development and strengthening the RIA community, remains an important part of ARIA's journey.

Recognising Lovaii Navlakhi's Contribution to ARIA



Lovaii Navlakhi is one of the founding members of ARIA and has been instrumental in shaping the Association's vision, mission and growth. Over the years, his experience, leadership and continued involvement have contributed significantly to ARIA's development.

Lovaii has served as Chairperson of ARIA twice, in 2021–22 and 2024–25, providing leadership at different stages of the Association's journey. Since ARIA's inception, he has also played an important role in partner relationships and fundraising, helping build relationships that have supported the Association's initiatives.

He has been closely associated with ASPIRE, ARIA's flagship event, having led it twice, and played a key role in organising ARIA's Virtual Summit during the COVID-19 period, helping sustain member engagement and learning during a challenging time.

He has participated as a speaker and moderator at many ARIA webinars and workshops sharing his knowledge and expertise with the audience.

More recently, in July 2026, Lovaii represented ARIA, alongside Suresh Sadagopan, at the inaugural NISM Quiz for Securities Market Entities, where ARIA secured first place among 18 participating teams. He has also contributed actively to several ARIA committees, including Media, Partner Engagement, Member Engagement and New Membership, reflecting his commitment to strengthening the Association across multiple areas.

ARIA places on record its sincere appreciation to Lovaii for his leadership, contribution and commitment over the years. His role in shaping ARIA's journey and strengthening the RIA community will remain an important part of the Association's history.

Recognising Shailendra Kumar's Contribution to ARIA



Shailendra Kumar has been associated with the ARIA Board since December 2023 and has contributed significantly through his expertise in technology, investment advisory and active involvement in ARIA's initiatives.

As a member of the Technology/Website Committee, he has brought his technology and product-development experience to ARIA's digital initiatives, including the website upgrade and efforts to leverage technology for the benefit of RIAs.

Shailendra has also been an active member of the Advocacy Committee, contributing to ARIA's engagement with regulators and industry stakeholders. He played a key role in working with BSE to address operational issues faced by RIAs, contributing to regulatory consultation papers, and providing inputs on graded regulation and other reforms affecting the advisory profession.

He has further contributed to ARIA's knowledge-sharing initiatives, including moderating the May 2026 session "AI for IA: The Intelligent Edge for Advisors", bringing the important topics of AI and technology adoption to the RIA community.

ARIA sincerely thanks Shailendra for his technology expertise, industry experience and active contribution to ARIA's advocacy, digital and professional-development initiatives.

Recognising Tarun Birani's Contribution to ARIA



Tarun Birani has been associated with the ARIA Board since 2020 and has made a meaningful contribution to the Association's growth and the development of the RIA profession.

He served as Treasurer in FY 2022–23 and Vice-Chairperson in FY 2023–24, contributing to ARIA's governance, financial oversight and strategic direction.

Tarun also played a key role in ASPIRE 2022 as Co-Lead of the ASPIRE Leadership Team, contributing to the programme's focus on strengthening and scaling RIA practices, including practice scale-up and business growth.

A strong advocate of knowledge sharing, he has participated in and moderated sessions on passive investing and unlisted private equity, and conducted workshops for aspiring RIAs at ASPIRE, sharing practical insights and guidance with professionals entering the investment advisory profession.

He has also contributed to ARIA's Media, Accounting & Finance and New Membership Committees, supporting the Association's communication, governance and membership-growth initiatives.

ARIA sincerely thanks Tarun for his leadership, practical insights and continued commitment to strengthening ARIA and supporting the growth of the RIA profession.

NISM quiz winner ARIA represented by Lovaii & Suresh



NISM National Institute of Securities Markets Scoreboard		
CARE RATINGS	20	★
BSE	205	★
NSDL	0	★
AMFI	145	★
CRISIL	65	★
ARIA	285	★

www.nism.ac.in



We are delighted to share that ARIA secured First Place at the inaugural NISM Quiz for Securities Market Entities (QSME 2026), held on 25th July 2026 at the MCA Recreation Centre, BKC, Mumbai.

ARIA was represented by our Board Members, Lovaii Navlakhi and Suresh Sadagopan. The quiz brought together participants from across the securities market ecosystem like (BSE, NSE, CRISIL, AMFI, etc) to test their expertise in market regulations, compliance, market infrastructure, and emerging trends. There were a total of 18 teams.

This achievement is not just a win for ARIA, but a proud moment for the entire Registered Investment Adviser (RIA) profession.

A special thank you to Lovaii Navlakhi and Suresh Sadagopan for flying the ARIA flag high and making the association proud. Our sincere thanks to NISM for organising this excellent initiative and creating a platform that encourages knowledge-sharing and professional excellence within the securities market ecosystem.

Working group to review regulatory framework for MFD



ARIA representation for Corporate Law amendment



We are pleased to inform you that ARIA was invited by the Joint Parliamentary Committee (JPC) on the Corporate Laws (Amendment) Bill, 2026 to present the views and recommendations of the RIA community during the Committee's study visit to Mumbai held on 2nd and 3rd July 2026.

ARIA was represented by:

Amit Kukreja, Chairperson, ARIA

Harsh Roongta, Board Member, ARIA

Vivek Rege, Board Member, ARIA

We encourage members to review ARIA's submission and representations made before the Committee, which are available here: <https://aria.org.in/wp-content/uploads/2026/07/ARIA-JPC-Detailed-Submission-7.07.2026.pdf>

We remain committed to actively representing the interests of the RIA profession and contributing constructively to policy and regulatory developments impacting our industry.

HDFC Quiz Winners Round 10 And 11

HDFC QUIZ WINNERS – ROUND 10!

- 🏆 Chinmay Naik
- 🏆 Harendra Zatakia
- 🏆 Sudhanshu Shekhar Patel
- 🏆 Abhijit Talukdar
- 🏆 Maxie Jose

HDFC QUIZ WINNERS – ROUND 11!

- 🏆 Sudhanshu Shekhar Patel
- 🏆 Harendra Zatakia
- 🏆 Pramiti Rawat
- 🏆 Tarun Rokadiya
- 🏆 Venkatesh Subramanian

Idea Box

HARDIK THAKKAR



From Paper Chasing to Pure Alpha: Why the Account Aggregator is an RIA's Friend

As SEBI-registered investment advisers, our value proposition lies in behavioral coaching, asset allocation, and tailoring financial plans to our clients' real lives. Yet, how much of our practice's energy is sucked into the black hole of onboarding operations?

Between chasing clients for password-protected PDFs, manually parsing fragmented bank statements, and reconciling scattered mutual fund CAS sheets, the journey to holistic planning usually begins with administrative tasks.

Enter the Account Aggregator (AA) ecosystem—not just a piece of digital public infrastructure, but an explosion of operational efficiency that has quietly become the ultimate ally for the modern RIA.

The Rise of a Financial Super-Highway. Data don't Lie!

If you still think the AA ecosystem is a niche technology experiment, the scale of its adoption tells a completely different story.

Snapshots of the eco-system (As of May 2026)

Operational Account Aggregators (AAs)	Live Regulated Entities (REs)	Live Financial Information Providers (FIPs)	Live Financial Information Users (FIUs)
17	1087	176	1046

Monthly Count of Accounts Linked (in Crore)	Monthly Count of new consents fulfilled (in Crore)	Monthly count of data delivered on Linked Accounts (in Crore)	Cumulative Count of Accounts Linked (in Crore)	Cumulative Count of consents fulfilled (in Crore)
1.04	2.35	30.25	30.48	47.42

Personal Finance Management (PFM) users have grown to ~6 crore, at a 164% CAGR since FY23 — a signal of how fast retail India is warming to consented data sharing.

How did it help us ?

Metric	Without Account Aggregator	With Account Aggregator(App SDK)
Onboarding Time	2–3 days (document upload & verification)	Under 5 minutes
Data Coverage	Partial (can automate only MFs via CAS or user inputs)	360° (Bank, MF, Stocks, NPS, Insurance) (Other Financial Information types like FDs, RDs, Bonds, EPF, GST data - would also be shared in the AA network in near future)
Data Collection and time taken for it	Delayed, Manual or Bug-prone OCR - may require verification and clean up	Fast, clean, structured JSON via API
Data Analytics	Requires tools to process data and run analytics	Easy to build insights and analytics layer on AA data
User Drop-off Rate	High (due to friction at document sharing step)	Low (1-tap OTP authorization)
Tracking	Delayed (with manual intervention)	Near-real-time

Moving Up the Value Chain

By letting the AA ecosystem handle the heavy lifting of data aggregation, your team shifts from being operational data collectors to true strategic advisors. You can scale without linearly scaling your back-office headcount. The Account Aggregator isn't a tech threat looking to replace you; it is an infrastructure friend built to liberate you.



New Membership Committee



New Membership Committee Note:

On 1 August 2026, the New Membership Committee hosted an engaging and interactive session for new and aspiring Registered Investment Advisers (RIAs).

The session saw enthusiastic participation from 53 attendees and received an impressive average rating of 4.5/5. The interactive format provided participants with an opportunity to raise questions and gain practical insights.

A special thanks to Thejus Palathingal, Indrani Banerjee, and Saurabh Bansal for conducting an excellent session, addressing participants' queries, and sharing valuable guidance.

The strong interest from participants also led to requests for a follow-up session on compliance, which will be taken up for discussion at the next committee meeting.



Members and Partners Engagement Committee



Members and Partners Engagement Committee

Over the past few months, ARIA's industry interactions have brought together leading voices from asset management, wealth management and the advisory ecosystem to explore the trends, opportunities and challenges shaping the investment advisory profession. From trust and technology to asset allocation, currency movements, investment behaviour and the future of RIA practices, these sessions have offered members practical insights and perspectives from some of the industry's leading professionals.

18 June 2026 | Navigating Change: Trust, Advice & Technology

ARIA hosted an engaging CEO interaction with Avinash Satwalekar, President, Franklin Templeton Asset Management (India) Private Limited, moderated by Lovaii Navlakhi, MD & CEO, International Money Matters. The conversation explored the changing wealth management landscape and the intersection of client trust, advisory standards and technology, with insights on navigating change while continuing to deliver meaningful value to clients.

25 June 2026 | Smart Allocation for a World in Flux

ARIA hosted an insightful panel discussion featuring Ramkumar K M, Head of Products, HDFC AMC; Saurabh Bhatia, Investment Specialist & Head – Products, SBI Mutual Fund; and Harsha Upadhyaya, CIO, Equity & President, Kotak Mahindra AMC. The panel explored market trends, strategic asset allocation and portfolio construction in a rapidly changing environment, offering perspectives on building resilient portfolios while maintaining a disciplined, long-term approach.

16 July 2026 | Beyond ₹100 Lakh Crore: The Next Era of Asset Management

ARIA hosted an engaging CEO interaction with D. P. Singh, Joint CEO, SBI Mutual Fund, moderated by Shefali Garg, SEBI Registered Investment Adviser and Founder, Investopedia India. The session explored the evolving asset management and wealth management landscape, including the strategic shifts, opportunities and challenges likely to shape the next phase of the industry.

23 July 2026 | Currency Fluctuations: Factors, Mitigation and Opportunities

ARIA hosted an insightful panel featuring Anuj Tagra, VP & Portfolio Manager – Fixed Income, Franklin Templeton; Anurag Mittal, Head of Fixed Income, UTI AMC; and Chintan Haria, Principal Investment Strategist, ICICI Prudential AMC, moderated by Tarun Birani, Founder & CEO, TBNG Capital Advisors. The discussion explored the drivers of currency fluctuations, risk-mitigation strategies and opportunities arising from currency volatility.

6 August 2026 | Beyond Performance: What Drives Investment Decisions?

ARIA hosted an insightful conversation featuring Sankaran Naren, Executive Director & CIO, ICICI Prudential Mutual Fund, moderated by Hardik Thakkar, Co-founder & Principal Officer, Cusp Money Advisors Private Limited. The session explored the factors that influence investment decisions beyond headline performance, offering valuable insights drawn from Mr. Naren's extensive investment experience.

20 August 2026 | Advising NRIs: Trends & Opportunities

ARIA hosted an insightful session featuring Rahul Sharma, Joint AVP – International Business, HDFC AMC Ltd; Saurabh Bhatia, Investment Specialist & Head – Products, SBI MF; and Kiran Voleti, Principal Officer, Franklin Templeton Asset Management (IFSC), moderated by Jigar Patel, Founder & Principal Officer, Neuron Wealth Advisors. The discussion explored the evolving NRI investor landscape, changing client needs and opportunities for RIAs serving this growing segment.

27 August 2026 | AI in Action for RIAs: Practical Use Cases

ARIA hosted an insightful session featuring Rohan Borawake, Co-Founder & CEO, FinSharpe, as Speaker, and Pramiti Rawat, SEBI Registered Investment Adviser, as Moderator. The session focused on the practical application of AI in RIA practices, exploring how AI tools can improve efficiency, streamline operations and enhance client engagement.

3 September 2026 | CEO Interaction – The Next 5 Years of RIA Practice: What Will Change for RIAs?

ARIA hosted an engaging CEO interaction featuring Navneet Munot, MD & CEO, HDFC Mutual Fund, moderated by Upasana Mondal, SEBI RIA, DreamBluePrintz. The discussion explored the evolving expectations of HNI and UHNI investors and how these changing dynamics could shape the future of RIA practice, offering perspectives on the opportunities and challenges ahead.

10 September 2026 | Scale. Sustain. Succeed: The RIA Practice Playbook

The series continues with Rohit Shah, Founder & CEO, GYR Financial Planner, and S R Srinivasan, Principal Officer, SriNivesh Advisors, as Speakers, moderated by Pramiti Rawat, SEBI Registered Investment Adviser.

The session explores practical strategies, real-world perspectives and actionable ideas to help RIAs build practices that are resilient, scalable and sustainable, and thrive over the long term.

Through these interactions, ARIA continues to create a platform for members to learn from industry leaders, exchange perspectives and stay ahead of the changes shaping the future of investment advice.



Advocacy Committee Note



Advocacy Committee

Note:

ARIA continues to engage with SEBI, BSE and other regulatory stakeholders on key issues affecting Registered Investment Advisers (RIAs).

1. Pending/Missing RIA Data

ARIA undertook a coordinated exercise with SEBI and BSE to follow up on pending RIA data. Following outreach to members, the exercise has now been substantially completed. Of the 45 members whose data was pending with SEBI, data has been received for 44 members, with the remaining member expected to submit shortly.

2. BSE Portal – Annual Audit Readiness

The BSE portal is expected to go live by 19 September 2026 for the Annual Audit process. Once live, ARIA Board members and volunteers will test the portal in the production environment to identify and address any issues. ARIA will also organise a demo webinar for members to familiarise them with the audit submission process. BSE is expected to issue a circular outlining the timelines and other process requirements.

3. SEBI Consultation Papers ARIA has also submitted its inputs on the following SEBI Consultation Papers:

- **Modification in the Regulatory Framework for Online Bond Platform Providers (OBPPs) - Link**
- **Draft Circular for Enabling Third Party Payments in Mutual Funds in Certain Scenarios - <https://aria.org.in/wp-content/uploads/2026/06/Consultation-paper-on-Draft-Circular-for-Enabling-Third-Party-Payments-in-Mutual-Funds-in-certain-scenarios.pdf>**
- **Common Advertisement Code for Specified SEBI Regulated Entities - <https://aria.org.in/wp-content/uploads/2026/07/Consultation-Paper-on-Common-Advertisement-Code-for-specified-SEBI-regulated-entities-final.pdf>**

These submissions reflect ARIA's continued efforts to highlight the practical concerns of RIAs and provide industry inputs on proposed regulatory changes.

4. Market Data Advisory Committee – RTA/KRA Issues

As a part of the Market Data Advisory Committee (MDAC), ARIA is working with industry stakeholders to discuss and resolve RTA/KRA-related issues faced by RIAs. ARIA also conducted a member survey to collate the key issues and challenges faced by members, which will be presented for discussion at the upcoming MDAC meetin

ARIA Membership Details:

Membership Category	Jun 2026	Sep 2026
Individual - Annual	135	144
Individual - Life Members	20	19
Total Individual	155	163
Non- individual - Annual Members	118	121
Non- individual - Life Members	31	31
Total Non-Individual	149	152
Associate-Annual	58	63
Affiliate - Annual	48	58
Total Membership - Annual	359	386
Total Membership - life	51	50
Total Membership	410	436

Sessions Conducted From July-September

SBI MUTUAL FUND
A PARTNER FOR LIFE

ARIA
Association of Registered Investment Advisers

CEO INTERACTION

Beyond ₹100 Lakh Crore
The Next Era of Asset Management



Speaker
D P SINGH
Joint CEO
SBI Mutual Fund



Moderator
SHEFALI GARG
SEBI Registered Investment
Adviser & Founder
Investopedia India

Thursday, 16th JULY 2026
5:00 PM to 6:00 PM

LIVE
zoom

Link to recording: <https://aria.org.in/resource-centre/https-drive-google-com-file-d-1mdfelzfgu7wqq6kd2bgfueeyumjodkns-viewuspsharing/>

ARIA
Association of Registered Investment Advisers

Panel Discussion

Currency fluctuations and factors leading to them and mitigation and opportunities

Panelists



ANUJ TAGRA
VP and Portfolio Manager
Fixed Income
Franklin Templeton



ANURAG MITTAL
Head - Fixed Income
UTI Asset Management
Company Ltd. (UTI AMC)



CHINTAN HARIA
Principal
Investment Strategist
ICICI Prudential AMC



TARUN BIRANI
Founder & CEO
TBNO Capital Advisors

Moderator

FRANKLIN TEMPLETON | **uti** | **ICICI PRUDENTIAL**
UTI Mutual Fund | MUTUAL FUND

23 JULY
Thursday
5:15 PM to 6:15 PM

LIVE
zoom

Link to recording: <https://aria.org.in/resource-centre/currency-fluctuations-and-factors-leading-to-them-and-mitigation-and-opportunities/>

ARIA
Association of Registered Investment Advisers

THE EVOLVING RIA

Hear from the advisors who just launched and those who built the foundation.

RIA CLINIC SERIES

Speaker



SAURABH BANSAL
Founder & Principal Advisor
Fin@Work

Speaker



INDRANI BANERJEE
FCA, Director & Principal Officer
Wealth Beacon Investment
Advisors Pvt. Ltd.

Moderator



THEJUS PALATHINGAL
Co Founder
Northward

SATURDAY
01ST AUG 2026

04:00 PM
to
05:30 PM

LIVE
zoom

Link to recording: <https://aria.org.in/resource-centre/the-evolving-ria-hear-from-the-advisors-who-just-launched-and-those-who-built-the-foundation/>

Sessions Conducted From July-September

FRANKLIN TEMPLETON **ARIA**

CEO INTERACTION

Navigating Change: Trust, Advice & Technology

Speaker **Moderator**

Avinash Satwalekar
President
Franklin Templeton
Asset Management
(India) Private Limited

Lovail Navlakh
MD & CEO
International Money Matters

Thursday
18th June
2026

05:00 PM
To
06:00 PM

LIVE
zoom

Link to recording: <https://aria.org.in/resource-centre/navigating-change-trust-advice-technology/>

ARIA

Smart Allocation for a World in Flux

SPEAKER **SPEAKER** **SPEAKER** **MODERATOR**

RAMKUMAR K M
Head of Products
HDFC AMC

SAURABH BHATIA
Investment Specialist
& Head Products
SBI MF

HARSHA UPADHYAYA
Chief Investment Officer - Equity
Kotak Mahindra
AMC

JITENDRA SOLANKI
SEBI RIA

HDFC MUTUAL FUND **SBI MUTUAL FUND** **kotak Mutual Fund**

Thursday
25th June
2026

05:00 PM
To
06:00 PM

LIVE
zoom

Link to recording: <https://aria.org.in/resource-centre/smart-allocation-for-a-world-in-flux/>

ARIA **HDFC** **SBI MUTUAL FUND** **FRANKLIN TEMPLETON**

Advising NRIs:
Trends & Opportunities

SPEAKER **SPEAKER** **SPEAKER** **MODERATOR**

Rahul Sharma
Joint AEP -
International Business,
HDFC AMC Ltd.

Saurabh Bhatia
Investment Specialist
and Head - Products,
SBI MF

Kiran Voleti
Principal Officer for Franklin
Templeton Asset
Management (IFSC)

Jigar Patel
Founder's Principal
Officer, Neuron Wealth
Advisors

PANEL DISCUSSION

DATE
Thu, 20th Aug '26

TIME
5 to 6 PM

LIVE ON
Zoom

Link to recording: <https://aria.org.in/resource-centre/advising-nris-trends-opportunities/>

Sessions Conducted From July-September

ARIA Association of Registered Investment Advisers

ICICI PRUDENTIAL MUTUAL FUND

Beyond Performance: What Drives Investment Decisions?

Insights from two decades of managing investments and observing investor behaviour



Sankaran Naren
Executive Director & Chief Investment Officer (CIO), ICICI Prudential AMC

SPEAKER



Hardik Thakkar
Co-founder and Principal Officer - Cusp Money (Cusp Money Advisors Private Limited)

MODERATOR

DATE Thu, 6th Aug '26
TIME 5 to 6 PM
LIVE ON Zoom

Link to recording: <https://aria.org.in/resource-centre/beyond-performance-what-drives-investment-decisions/>

ARIA Association of Registered Investment Advisers

AI in Action for RIAs: Practical Use Cases



ROHAN BORAWAKE
Co-Founder & CEO at FinSharpe

SPEAKER



PRAMITI RAWAT
SEBI Registered Investment Adviser

MODERATOR

FRANKLIN TEMPLETON | HDFC MUTUAL FUND | ICICI PRUDENTIAL MUTUAL FUND | KOTAK MUTUAL FUND | SBI MUTUAL FUND | S&P Dow Jones Indices | L1

DATE Thu, 27th Aug '26
TIME 5 to 6 PM
LIVE ON Zoom

Link to recording: <https://aria.org.in/resource-centre/ai-in-action-for-rias-practical-use-cases/>

ARIA Association of Registered Investment Advisers

HDFC MUTUAL FUND BHAROSA APNO KA

CEO INTERACTION

THE NEXT 5 YEARS OF RIA PRACTICE: What Will Change for RIAs?

The Changing HNI/UHNI Investor



NAVNEET MUNOT
MD & CEO, HDFC Mutual Fund

SPEAKER



UPASANA MONDAL
SEBI RIA, DreamBluePrintz

MODERATOR

DATE Thu, 3rd Sep '26
TIME 4 to 5 PM
LIVE ON Zoom

Link to recording: <https://aria.org.in/resource-centre/the-next-5-years-of-ria-practice-what-will-change-for-rias/>

KNOW YOUR BOARD MEMBERS



AMIT KUKREJA
Chairperson



KAVITHA MENON
Vice-Chairperson



VIVEK REGE
Treasurer



RENU MAHESHWARI
Immediate Past Chairperson



HARSH ROONGTA
Past Chairperson



JIGAR PATEL
Board Member



LOVAII NAVLAKHI
Past Chairperson



SHAIENDRA KUMAR
Board Member



SURESH SADAGOPAN
Board Member



TARUN BIRANI
Board Member

KNOW YOUR COMMITTEE

1. MEMBER ENGAGEMENT COMMITTEE

BOARD MEMBERS

Lovaii Navlakhi, Suresh Sadagopan, Jigar Patel

VOLUNTEERS

Upasana Mondal, Akhilesh V Gokaraju, Monica Malkani, Nitin Sawant, Apurv Gupta, Hardik Thakkar, Pramiti Rawat

2. NEW MEMBERSHIP COMMITTEE

BOARD MEMBERS

Jigar Patel, Lovaii Navlakhi, Vivek Rege

VOLUNTEERS

Sachin Walavalkar, Sushilkumar Pardeshi,
Thejus Palathingal, Abubakr Siddique, Hrushikesh Kale,
Indrani Banerjee, Kanika Shah

3. PARTNER ENGAGEMENT COMMITTEE

BOARD MEMBERS

Vivek Rege, Amit Kukreja, Lovaii Navlakhi, Tarun Birani

VOLUNTEERS

Hemendra Gandhi, Kharanshu Parikh, Jitendra Solanki, Shefali Garg

4. ADVOCACY COMMITTEE

BOARD MEMBERS

Harsh Roongta, Kavitha Menon, Shailendra Kumar,
Vivek Rege, Renu Maheshwari, Jigar Patel

VOLUNTEERS

Viraj Padhye, Biharilal Deora

5. WARIA COMMITTEE

BOARD MEMBERS

Renu Maheshwari

VOLUNTEERS

Ratnasri Karra

6. MEDIA COMMITTEE

BOARD MEMBERS

Renu Maheshwari, Suresh Sadagopan, Tarun Birani, Kavitha Menon

VOLUNTEERS

Ananya Roy, Prakash Praharaj, Roshni Nayak

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Thank you



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