MUTUAL FUND DISTRIBUTORS FROM KOLKATA

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2025 Award

ACE FINANCIAL SERVICES

AS ONE OF THE

10 MOST PROMISING MUTUAL FUND DISTRIBUTORS FROM KOLKATA - 2025

Through this certification, Finance Outlook India extends its recognition, gratitude, and admiration to some of the most prominent mutual fund distributors in Kolkata.

SAMRAT PRADHAN
Managing Editor

ACE FINANCIAL SERVICES

Empowering Investor-Centric Advisory Rooted in Purpose & Progress

Sreya Mukherjee
Managing Partner

India's mutual fund industry is undergoing a structural transformation, with AUM at ₹73 lakh crore and monthly SIP inflows of INR ₹27,000 crore across nine crore accounts. This marks a golden era for investor-focused distribution, driven by digital penetration and rising Tier 2/3 city participation, especially in states like West Bengal. Younger, tech-savvy investors and women are more goal-oriented in their investment approach. However, challenges like information overload, social media-driven advice, and lack of financial literacy often lead to emotional investing, poor asset allocation, and unrealistic expectations, hindering disciplined wealth creation and alignment with life goals.

By understanding the market trend and challenges, ACE Financial Services position itself as both educators and enablers. The firm begins every engagement with risk profiling, goal mapping and finally the purpose for the investment. This leads to creating awareness even before recommending a product; thereby ensuring clients have the utmost clarity to invest.

The Resilient Journey

Founded by Late Chandra Mohan Mukherjee in 2004, ACE Financial Services, based in Kolkata, was developed with a vision of ethical, meaningful investing. Initially focused on share trading, the company later transitioned to mutual funds in 2008. The firm is currently led by his daughter, Sreya Mukherjee, who carries forward his legacy with a strong commitment to investor empowerment. Her mother, Sonali Mukherjee, actively supports the continuation of this legacy, while Anukta Majumder, Senior Manager and a pillar of the organization since inception, continues to play a vital role in its growth.

Today, as a second-generation business, ACE Financial Services follows a modern approach grounded in empathy and digital transformation. "I believe investors should not just invest, but invest with clarity, confidence and purpose. Our tagline is shortened to 'Knowledge, Technology and Experience.' We are disciplined, transparent and client centric", states Sreya Mukherjee, Managing Partner, ACE Financial Services.

Under Sreya's leadership, the firm grew its AUM from ₹90 crore to over 50 percent higher through consistent effort and trust-building. With a team of seasoned professionals, many of them women, the firm emphasizes empathy, discipline, and long-term vision. Sreya believes in women empowerment and inclusivity, not by design, but by merit. The firm aims for sustainable financial freedom through structured, goal-aligned investments. She believes in educating both men and women on the advantages of mutual funds over fixed deposits and post office schemes for long-term wealth creation. While focusing on awareness within the Bengali community and among women investors, her broader mission is to promote mutual fund awareness across all communities through a digital-first, client-centric approach that champions trust, clarity, and financial independence.

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Advisory Edge

The firm offers a comprehensive suite of financial solutions, including mutual fund distribution across equity, debt, hybrid, thematic, and index categories, along with SIP planning, goal-based strategies for retirement, education, and marriage, tax planning through ELSS, and fixed income instruments like NPS, bonds, and FDs. Additionally, it builds and manages documentation responsible for regulatory and KYC updates, maintaining regular communication.

Rather than merely offering investment products, the firm's tight-knit group of professionals emphasizes partnership, clarity and lifelong support by becoming companions in each client's financial journey. ACE invests time in understanding each investor's unique financial personality and avoids push-selling or unrealistic return promises. It delivers customized portfolios tailored to goals like retirement, education or wealth preservation. Furthermore, the firm's long-standing relationships with top AMCs further enhance its ability to offer a wide, unbiased range of investment options tailored to diverse client needs.

The Meticulous Approach

With a partnership with one of India's leading fintech platforms, it offers advanced financial technology that enables investors to view visual portfolio summaries, track goals in real-time, access detailed analytics and gain real-time insights, while keeping human advisory at the core of the experience.

The firm places a strong emphasis on after-sales support, a key differentiator often overlooked in the industry. It ensures regular portfolio reviews, offers doorstep services and maintains constant communication to keep investors informed and confident beyond the point of transaction. ACE Financial Services remains vigilant and proactive during market fluctuations, taking timely action based on market news, fund performance, or regulatory changes. Whether it's portfolio rebalancing, fund switches, or redemptions, the team stays on top of every investor need with responsiveness and care.

ACE Financial Services recognizes that many women, despite being strong and independent decision-makers, often lack confidence in financial planning. In several cases, investments are made in their names without their active involvement or understanding. To address this, the firm creates a safe, approachable space where women can learn, plan, and take charge of their financial journeys. As a woman-led and inclusive firm, it actively empowers women investors, fostering financial awareness and independence. Women investors who have found it a safe and encouraging space to learn, plan, and grow. Many clients who started with small SIPs now manage substantial portfolios, reflecting ACE Financial Services' commitment to ethical advisory, personalized support, and long-term growth.

The firm simplifies investment processes in layman's terms, building confidence over time. It emphasizes disciplined SIPs, strategic asset allocation, frequent reporting, and annual reviews, ensuring clients stay focused on long-term wealth creation, not short-term market volatility.

A Robust Future Roadmap

With a solid foundation, ACE Financial Services wishes to reach a larger global audience while enhancing the level of engagement through multiple channels. It also wishes to expand the scope of its service offerings, including insurance and PMS. Overall, the firm wishes to become a trusted financial partner for each household by providing straightforward, ethical and sustainable financial guidance. As the market continues to shift, ACE Financial Services will be nimble to adapt to changes while always staying true to the vision that was established based on trust, simplicity, and long-term orientation. FOI