

# Investor Charter

SEBI Registered Research Analyst: Partha Shah INH000017815  
Vadodara-based research-led wealth management and portfolio review  
firm serving investors across Gujarat and India.

## Vision

To support investors with research-led, process-first portfolio review  
and analysis, with clear disclosures and no promise of returns.

## Mission

To help investors understand suitability, risk, overlap, and asset  
allocation before making further investment decisions through research  
guided by a SEBI Registered Research Analyst.

## Business transacted

PrimeIdea provides research and portfolio-review support covering  
mutual funds, equity, ETFs, fixed income, retirement, insurance  
planning context, and related wealth-management review. This is not  
SEBI Registered Investment Adviser advice unless separately registered.

## Rights of investors

Investors have the right to fair dealing, clear communication of risks,  
access to grievance redressal, and independent verification of SEBI  
registration. Read all scheme-related documents carefully.

## Expected timelines

Queries and complaints are acknowledged and reviewed as promptly as  
practicable. Complex matters may take longer where documents or  
third-party information is required. Escalation to SEBI SCORES remains  
available at <https://scores.sebi.gov.in/>

## Dos and donts

Do verify registration, share complete information, and treat research  
as process guidance. Do not expect guaranteed, market-beating, or  
risk-free returns. Do not treat website content as a substitute for  
your own due diligence.

## Disclaimer

Investments in securities market are subject to market risks.  
PrimeIdea Ventures does not guarantee returns.