

April 23, 2025

The Manager,
Listing Department,
BSE Limited,
Phiroze Jeejeebhoy Tower,
Dalal Street,
Mumbai 400 001.
BSE Scrip Code: 542772

The Manager,
Listing Department,
National Stock Exchange of India Ltd.,
Exchange Plaza, 5 Floor, Plot C/1, G Block,
Bandra - Kurla Complex, Bandra (E),
Mumbai 400 051.
NSE Symbol: 360ONE

Dear Sir / Madam,

Subject: Investor Presentation on unaudited / audited financial results for the quarter and financial year ended March 31, 2025

Pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements) Regulations, 2015, please find enclosed:

1. Results Update containing update on unaudited / audited financial results for the quarter and financial year ended March 31, 2025, as '**Annexure I**'; and
2. Investor Presentation for the quarter and financial year ended March 31, 2025 as '**Annexure II**'.

The aforesaid Results Update and Investor Presentation shall be uploaded on the website of the Company at 360.one/investor-relations.html.

Please take the same on your records.

Thanking you.
Yours truly,

For 360 ONE WAM LIMITED

Rohit Bhase
Company Secretary
ACS: 21409
Encl.: As above

360 ONE WAM LIMITED



360 ONE WAM Ltd. Results Update - Q4 and Full Year FY25

Key Highlights

FY25 PAT AT RS 1,015 CRORE - UP 26.6% YoY

FY25 TOTAL REVENUES AT RS 2,652 CRORE - UP 35.0% YoY

Q4 FY25 PAT AT RS 250 CRORE - UP 3.6% YoY

Q4 FY25 TOTAL REVENUES AT RS 658 CRORE - UP 5.7% YoY

OVERALL ASSETS UNDER MANAGEMENT (AUM) AT RS 5,81,498 CRORE AS ON MARCH 2025

ANNUAL RECURRING REVENUE (ARR) AUM AT RS 2,46,828 CRORE - UP 23.2% YoY

**360 ONE WAM ENTERED INTO EXCLUSIVE STRATEGIC COLLABORATION WITH UBS AG
ON WEALTH MANAGEMENT IN INDIA AND INTERNATIONAL MARKETS**

<i>Rs in Crs.</i>	Q4 FY25	Q3 FY25	Q-o-Q %	Q4 FY24	Y-o-Y %	FY25	FY24	Y-o-Y %
Revenue from Operations	652	605	7.7%	573	13.7%	2,446	1,846	32.5%
Annual Recurring Revenue	502	426	17.8%	357	40.7%	1,701	1,327	28.2%
Transactional / Brokerage Income	150	179	-16.3%	216	-30.8%	744	519	43.6%
Other Income	7	73	-91.1%	50	-86.9%	206	119	72.7%
Total Revenues	658	678	-2.9%	623	5.7%	2,652	1,965	35.0%
Total Expenses	334	319	4.6%	300	11.3%	1,218	956	27.3%
Operating Profit Before Tax	318	286	11.2%	273	16.4%	1,228	889	38.1%
Profit before Tax	324	359	-9.6%	323	0.4%	1,317	1,009	30.6%
Profit After Tax (incl. OCI)	250	275	-9.1%	241	3.6%	1,015	802	26.6%

Mumbai, April 23, 2025: 360 ONE WAM Limited, one of India's largest wealth and alternates asset managers, announced its financial results for the quarter and year ended March 31, 2025.

Business Performance

- **Assets under Management for 360 ONE stood at Rs 5,81,498 Crs**, consisting of ARR AUM of Rs 2,46,828 Crs and Transactional / Brokerage AUM of Rs 3,34,670 Crs
 - **Wealth Management: ARR AUM rose to Rs 1,62,433 Crs (+27% YoY)** supported by robust growth across segments. Our 360 ONE Plus proposition saw growth of 39% YoY, while Distribution and Lending businesses grew by 19% YoY and 36% YoY respectively. In FY25, 360 ONE Wealth successfully onboarded 440+ clients (with more than Rs 10 Crs ARR AUM). **Clients, having total AUM of Rs 10 Crs+, stand at 3,324 and account for 95% of Wealth AUM (excl. custody).** Overall, the segment manages assets for 7,500+ relevant clients. **Overall client attrition rate was 1.7% - one of the lowest in the industry**
 - **Asset Management: ARR AUM increased to Rs 84,395 Crs (+17% YoY)** mainly driven by growth in Listed Equity (+21% YoY), Private Equity (+16% YoY) and customized multi-asset (+42% YoY) segments
- **Strategic collaboration with UBS AG** will enhance the wealth management solutions available to domestic and global Indian clients. In addition, 360 ONE WAM will acquire UBS's India onshore wealth management business. UBS will also acquire convertible warrants representing 4.95% stake in 360 ONE WAM, demonstrating UBS's commitment to the fast-growing ultra and high-net-worth Indian market. The transaction is subject to necessary regulatory approvals
- **ET money integration was completed in Q4 FY25.** Regulatory approvals related to the acquisition of B&K Securities are in process and it is expected to be completed soon
- In the last 12 months, in recognition of its premier positioning, business impact and leadership excellence, 360 ONE received 23 awards, including **India's Best Wealth Manager by Euromoney Private Banking and Best Private Bank - India by Asian Private Banker**

Financial Performance for the year ended March 31, 2025

- **Total Revenue increased by 35.0% YoY to Rs 2,652 Crs** driven by strong growth in ARR AUM and Other Income
- **Revenue from Operations was Rs 2,446 Crs - an increase of 32.5% YoY**
- **ARR revenue was Rs 1,701 Crs - an increase of 28.2% YoY**
- **Combined ARR retention stood at 73 basis points (bps) vis-à-vis 76 basis points in FY24.** Within that, Wealth Management retention was at 73 bps, while Asset Management retention was at 74 bps
- **Consolidated Profit After Tax was Rs 1,015 Crs - an increase of 26.6% YoY** as against Rs 802 Crs for FY24
- **Tangible net worth stood at Rs 6,045 Crs. Tangible Return on Equity was at 24.3% in FY25**

Mr. Karan Bhagat (Founder, MD & CEO) said “this year has been a defining one for 360 ONE - characterised by strong growth, enhanced client trust, and the effective execution of our long-term strategy. Our results reflect the strength of our platform, the quality of our talent, and the clarity of our vision. Amid global volatility, investor interest in India continues to rise. **The exclusive strategic collaboration with UBS enhances our ability to deepen our presence and build a future-ready franchise that delivers lasting value to all stakeholders.”**

For further information, please contact:

Mr. Akshay Gavankar

Investor Relations | 360 ONE WAM Ltd.

Email: ir@360.one

Phone: +91 86558 09111

[Click here to register for conference call](#)

[Click here for investor presentation](#)

360 ONE WAM FY25 Analyst Conference call is scheduled for Wednesday, April 23, 2025, at 5:30 PM IST



360 ONE

Investor Presentation -
Q4 and Full Year FY25

Ring in 17 Years of Excellence.

Bringing Home the Oscars of
Wealth Management.



Best Private Bank - India
at Asian Private Banker's
14th Awards for Distinction

India's Best Wealth Manager
at Euromoney Private
Banking Awards 2025



AGENDA

- 1. 360 ONE at a Glance**
- 2. Business Introduction**
- 3. Financial Update - Q4 and Full Year FY25**
- 4. Strategic Collaboration - UBS AG & 360 ONE WAM**



AGENDA

1. 360 ONE at a Glance

2. Business Introduction

3. Financial Update - Q4 and Full Year FY25

4. Strategic Collaboration - UBS AG & 360 ONE WAM



360 ONE WAM - India's one of the leading wealth and alternates-focused asset firm

360 ONE WAM Ltd.

Wealth Management

Discretionary / Non-Discretionary / Advisory (360 ONE Plus)

- Asset Allocation
- Investment Policy Statement
- Review Mechanism and Portfolio Analytics

Financial Product Distribution

Transaction & Broking services

Corporate Treasury services

Lending Solutions

Estate Planning



Asset Management

Listed Equities	}	AIF
Private Equity		PMS
Private Credit		
Real Assets		Mutual Funds
Multi - Asset		

360 ONE is an embodiment of two words that are extremely important to us - '360' represents the holistic view we take of the 'ONE' person whose interests are always first: **Our Client.**

Our brand purpose, that has remained constant since 2008, is articulated as Performance Plus. Performance is objectively measured by numbers. It is the long-term performance and personalized care that we provide to our clients.

360 ONE - Corporate Overview

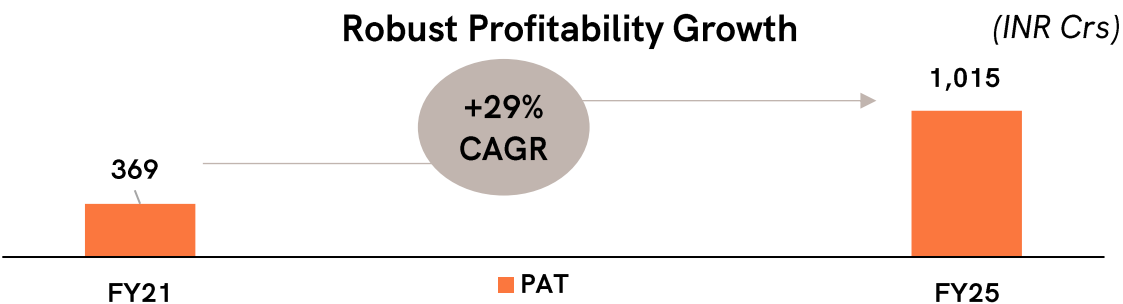
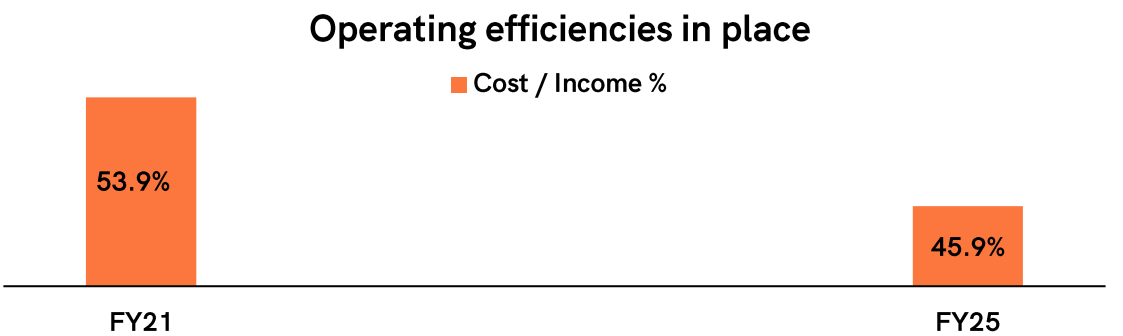
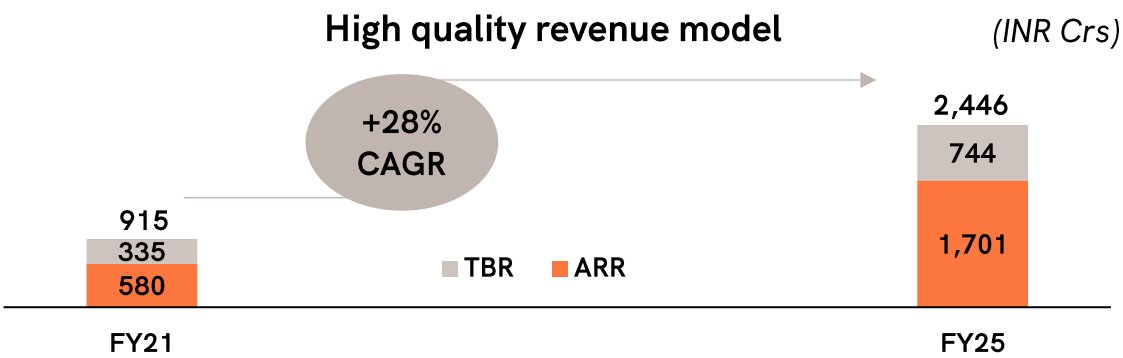
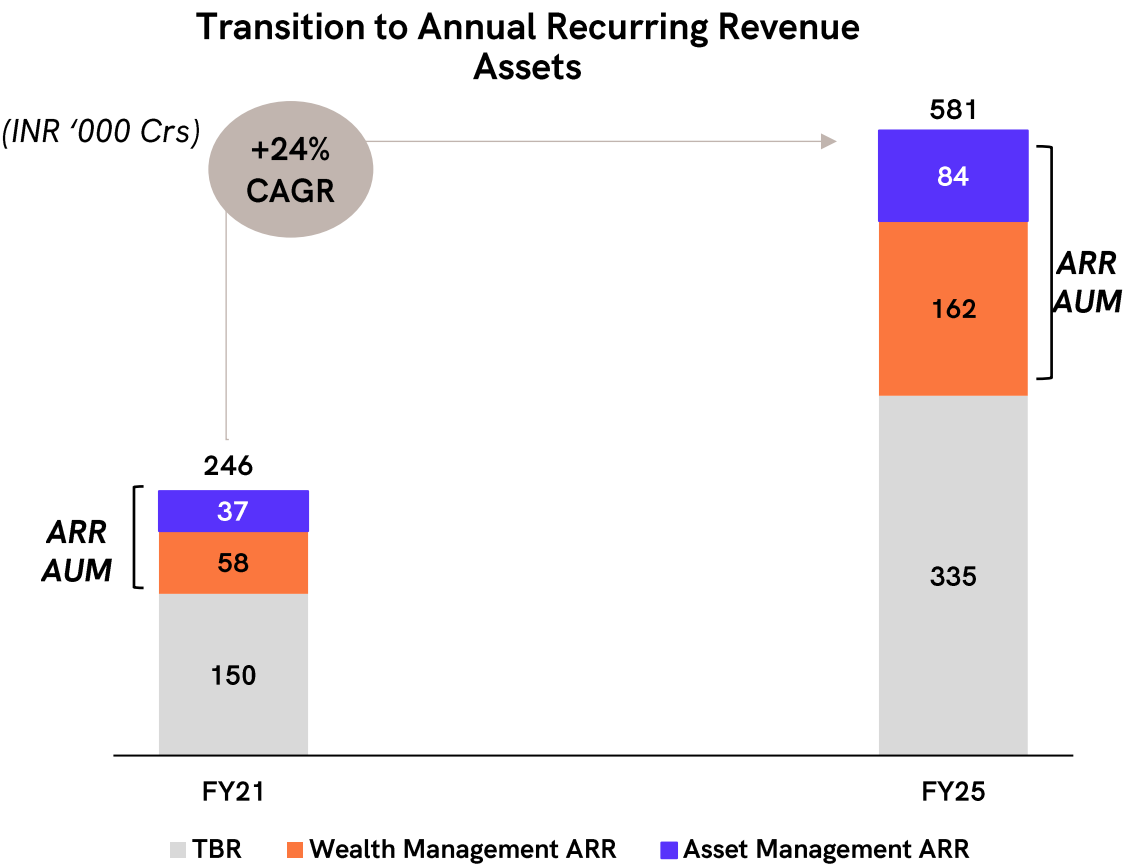
Credentials that lend trust to brand 360 ONE

Our Values	Strategy for path ahead	Core Business
<ul style="list-style-type: none">Client-centricEntrepreneurialRight in spirit and letterChange championPeople-orientedRigorous and risk-conscious	<ul style="list-style-type: none">GrowthResilienceAgility	<ul style="list-style-type: none">360 ONE PlusFinancial Product DistributionAsset management (AIF/PMS/MF)Estate planningFamily officeLending solutions
Publicly listed Private Wealth and Asset Manager Market cap: Rs 37,000+ crs (Mar '25)	7,500+ HNI + UHNI client families	Employee Team 1,400+ Employee strength
32 Offices India + International	~AUM Rs. 5,81,498 Crs^ <ul style="list-style-type: none">Wealth: Rs. 4,97,104 CrsAMC: Rs. 84,395 Crs	170+ Industry awards

Landmarks and Milestones
<ul style="list-style-type: none">2008 - 360 ONE Wealth was born2011 - Acquired 'Finest Wealth Managers', Pune2012 - AUM reached INR 25,000 crs2013 - Acquired an AMC and a Private Equity firm2014 - Became No. 1 Alternatives Manager2015 - General Atlantic picks up ~22% stake2016 - Acquired an NBFC, now known as 360 ONE Prime2017 - AUM Distribution and Advice crosses Rs 1 lac crore2018 - Acquired Wealth Advisors India and Altiore Advisors2019 - 360 ONE Wealth listed on NSE and BSE exchanges2020 - Acquired L&T Capital Markets2021 - AUM crossed INR 2.4 lac crore2022 - Bain Capital acquires ~25%2023 - Forayed in the HNI and Global space2024 - AUM crossed INR 5 lac crore2024 - Initiated acquisition of ET Money2024 - Raised INR 2,250 crore through QIP route2025 - Agreement to acquire B&K Securities2025 - Exclusive collaboration with UBS AG

HNI = High Net-worth Individuals; UHNI = Ultra High Net-worth Individuals; ^as on 31st March 2025, and includes custody promoters holding

360 ONE - Story in Charts



Strong growth in assets coupled with disciplined cost and capital management

Performance at a Glance - Annual

Strong trends in growth and profitability demonstrated...

P/L Summary (INR Crs)	FY21	FY22	FY23	FY24	FY25	CAGR %
Total AUM	2,46,083	3,27,237	3,40,834	4,66,909	5,81,498	24%
Wealth Management AUM	2,08,711	2,71,663	2,82,536	3,94,661	4,97,104	24%
Asset Management AUM	37,372	55,574	58,298	72,248	84,395	23%
Closing ARR AUM	95,652	1,38,308	1,54,000	2,00,419	2,46,828	27%
Average ARR AUM	74,542	1,20,110	1,41,326	1,73,945	2,31,610	33%
ARR Retention	0.78%	0.77%	0.82%	0.76%	0.73%	-
ARR Net Flows	-	32,985	21,884	16,136	25,974	-
Annual Recurring Revenue	580	921	1,165	1,327	1,701	31%
Transaction & Brokerage Income	335	477	400	519	744	22%
Revenue from Operations	915	1,398	1,565	1,846	2,446	28%
Other Income	137	137	4	119	206	11%
Total Revenue	1,053	1,535	1,569	1,965	2,652	26%
Costs	568	784	718	956	1,218	21%
Employee Costs	417	602	520	709	912	22%
Admin and Other Costs	150	183	198	247	306	19%
Operating PBT	348	614	847	889	1,228	37%
PBT	485	751	850	1,009	1,317	28%
PAT	369	582	668	802	1,015	29%
Cost to Income	53.9%	51.1%	45.8%	48.7%	45.9%	-
ARR as % of Total Op. Revenue	63%	66%	74%	72%	70%	-
Dividend per Share (INR)	17.5	13.8	17.3	16.5	6.0	-
ROE	12.5%	20.2%	22.0%	24.4%	20.7%	-
ROE Ex Goodwill & Intangibles	15.0%	24.7%	26.7%	30.1%	24.3%	-

* FY25 Wealth Management data includes ET Money results for the relevant period (AUM – INR 33,055 Crs; ARR Net Flows – INR 1,757 Crs)

8 ** EPS for FY21 and FY22 has adjusted for the sub-division of shares and bonus issue

Performance at a Glance - Quarterly

Strong trends in growth and profitability demonstrated...

P/L Summary (INR Crs)	Q4 FY24	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	YoY%
Total AUM	4,66,909	5,21,208	5,69,372	5,79,222	5,81,498	24.5%
Wealth Management AUM	3,94,661	4,41,556	4,83,602	4,93,972	4,97,104	26.0%
Asset Management AUM	72,248	79,652	85,770	85,250	84,395	16.8%
Closing ARR AUM	2,00,419	2,21,287	2,42,619	2,47,999	2,46,828	23.2%
Average ARR AUM	1,90,678	2,08,462	2,32,782	2,41,784	2,43,414	27.7%
ARR Retention	0.75%	0.72%	0.68%	0.70%	0.84%	-
ARR Net Flows	5,886	5,550	9,786	6,643	3,995	-
Annual Recurring Revenue	357	376	397	426	502	40.7%
Transaction & Brokerage Income	216	225	191	179	150	-30.8%
Revenue from Operations	573	600	589	605	652	13.7%
Other Income	50	97	30	73	7	-86.9%
Total Revenue	623	697	618	678	658	5.7%
Costs	300	265	299	319	334	11.3%
Employee Costs	225	194	224	240	254	12.7%
Admin and Other Costs	75	71	75	79	80	7.1%
Operating PBT	273	335	289	286	318	16.4%
PBT	323	315	319	359	324	0.4%
PAT	241	243	247	275	250	3.6%
Cost to Income	48.2%	38.0%	48.4%	47.1%	50.7%	-
ARR as % of Total Op. Revenue	62%	63%	67%	70%	77.0%	-
Tangible Net Worth	2,803	3,031	3,251	5,806	6,045	-
ROE	28.6%	27.4%	25.8%	21.0%	15.0%	-
ROE Ex Goodwill & Intangibles	35.2%	33.5%	31.2%	24.1%	17.1%	-

* Q4 FY25 Wealth Management data includes ET Money results for the relevant period (AUM – INR 33,055 Crs; ARR Net Flows – INR 1,757 Crs)

AGENDA

1. 360 ONE at a Glance

2. Business Introduction

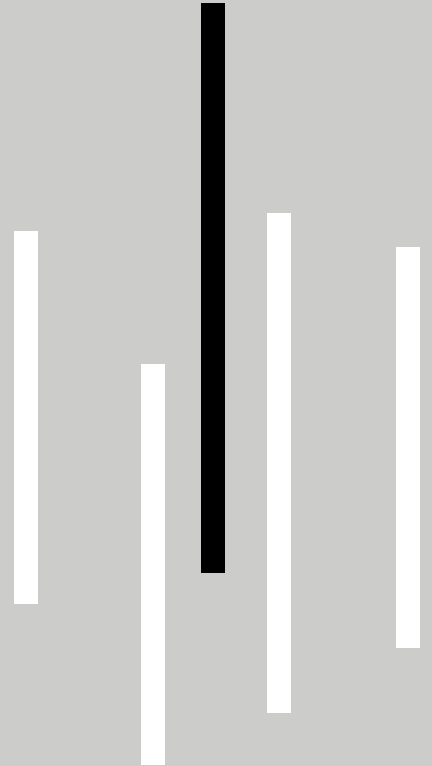
3. Financial Update - Q4 and Full Year FY25

4. Strategic Collaboration - UBS AG & 360 ONE WAM



Wealth Management

An Overview



360 ONE Wealth - One of India's largest wealth manager servicing 7,500+ clients

360 ONE Plus

Unique engagement designed to provide solutions for the Core Portfolio of our clients under **transparent fee model**. Continues to see robust traction with closing FY25 AUM at INR 62K Crs through Discretionary / Non-Discretionary / Advisory propositions

Lending

Our clients have access to **lending solutions** for their short-term capital requirements. With a loan book of INR 8,773 Crs, we have serviced over 1,000 customers through our loan offerings

HNI Segment

Our legacy and expertise in UHNI segment will enable us to extend our innovative products and best in class propositions to the **HNI segment** which is experiencing **remarkable growth**, with increasing demand for professional wealth management services

Product Distribution

Offers cutting-edge innovation-led products. Widest **open architecture** investment platform coupled with strong prime brokerage capabilities across equities, fixed income, commodities & currencies backed by 'in-house' research, thus ensuring superior execution

Transaction & Broking Services

360 ONE has independent broking license to provide **research backed broking services** to our Wealth clientele

Access to **unique product ideas** typically unavailable in the public markets

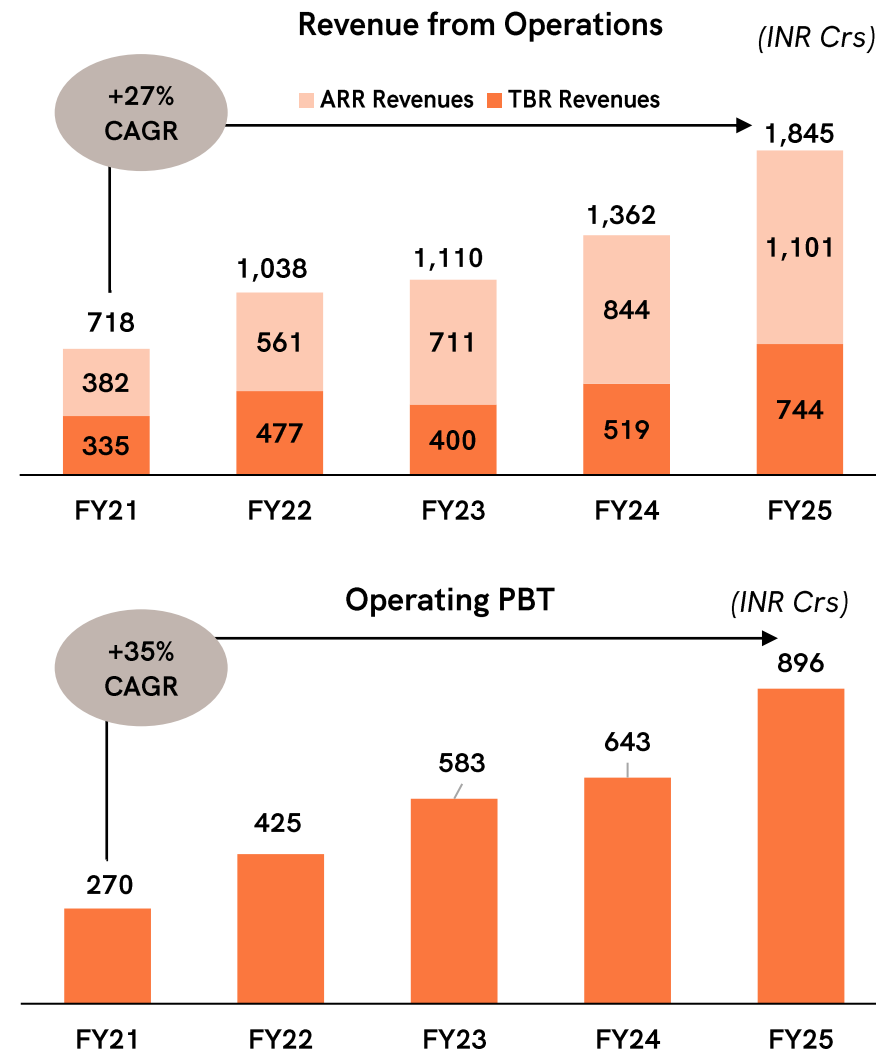
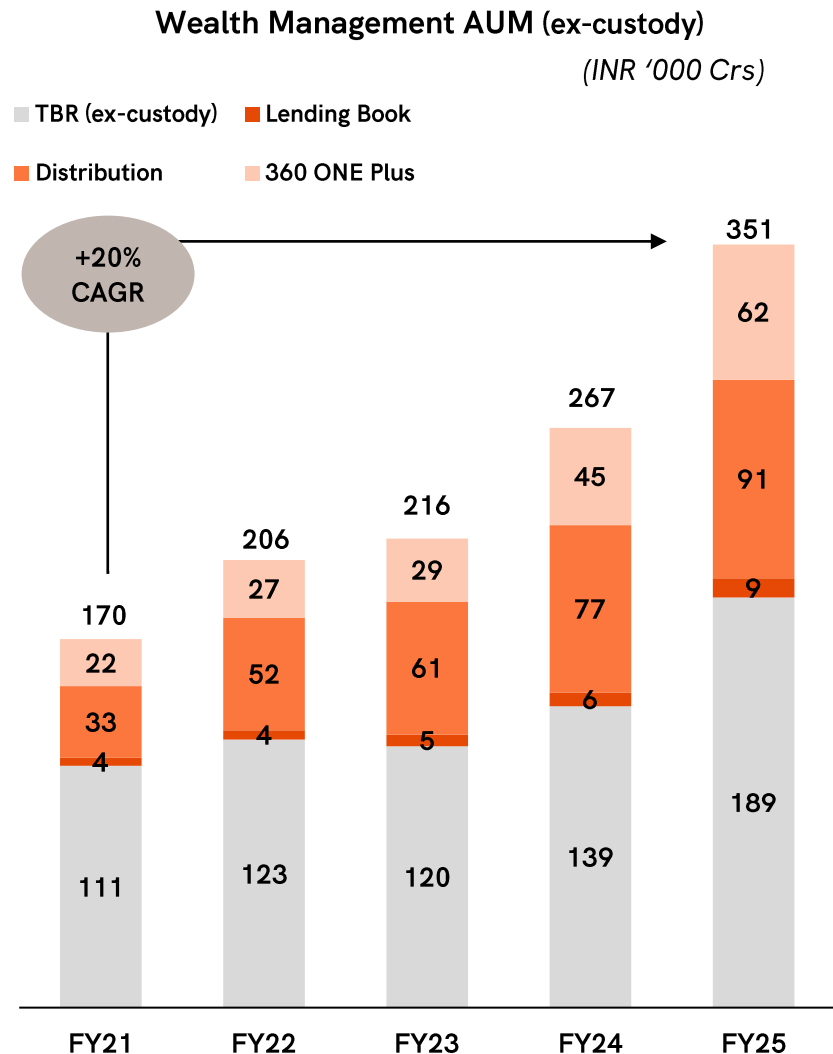
Strategic initiatives

Exclusive collaboration with UBS AG to strengthen WM proposition and drive significant synergies across business lines

Regulatory approvals for **acquisition of B&K Securities** underway

All approvals for the **ET Money acquisition** received in Feb 2025

Wealth Management - Story in Charts



- Moved to Trail based revenue model across all the offerings much ahead of the industry
- Brought trust and transparency to clients through advisory offerings; fees to clients with no retrocessions / commissions
- Disciplined and responsible approach on product selection with strong curation
- Comprehensive, unbiased advice & execution capabilities across our clients' financial & business wealth, succession & legacy needs

Wealth Management - Key Annual Financial Highlights

P/L SUMMARY (INR Crs)	FY21	FY22	FY23	FY24	FY25	CAGR %
Total Wealth AUM (ex-custody)	1,69,672	2,06,170	2,16,045	2,66,892	3,51,321	20%
Wealth ARR AUM	58,280	82,733	95,702	1,28,171	1,62,433	29%
360 ONE Plus (DPMS / NDPMS-RIA)	21,622	26,600	29,132	44,781	62,212	30%
Distribution Assets	33,038	51,815	61,203	76,960	91,448	29%
Lending Book	3,620	4,318	5,367	6,430	8,773	25%
Transaction & Broking (TBR ex-custody)	1,11,392	1,23,437	1,20,343	1,38,720	1,88,888	14%
Average ARR AUM	46,105	70,898	84,697	1,08,609	1,50,110	34%
ARR Retention	0.83%	0.79%	0.84%	0.78%	0.73%	-
ARR Net Flows	-	21,028	16,449	15,714	22,334	-
Average TBR AUM	1,10,108	1,24,654	1,20,590	1,30,818	1,58,213	9%
TBR Retention	0.30%	0.38%	0.33%	0.40%	0.47%	-
No. of relevant clients	6,707	6,833	6,850	7,195	7,527	-
- No. of clients (AUM > INR 10 Crs)	1,825	2,222	2,314	2,750	3,324	-
No. of Team Leaders	61	64	65	94	90	-
No. of Relationship Managers	188	164	141	152	128	-
Annual Recurring Revenue	382	561	711	844	1,101	30%
Transaction & Brokerage Income	335	477	400	519	744	22%
Revenue from Operations	718	1,038	1,110	1,362	1,845	27%
Other Income	115	112	3	107	177	11%
Total Revenue	833	1,150	1,113	1,469	2,023	25%
Costs	447	613	527	719	950	21%
Operating PBT	270	425	583	643	896	35%
Profit before Taxes (PBT)	386	537	586	750	1,073	29%
Cost to Income	53.7%	53.3%	47.4%	48.9%	46.9%	-
Custody AUM	39,039	65,493	66,491	1,27,769	1,45,782	-

* FY25 Wealth Management data includes ET Money results for the relevant period (AUM – INR 33,055 Crs; ARR Net Flows – INR 1,757 Crs)

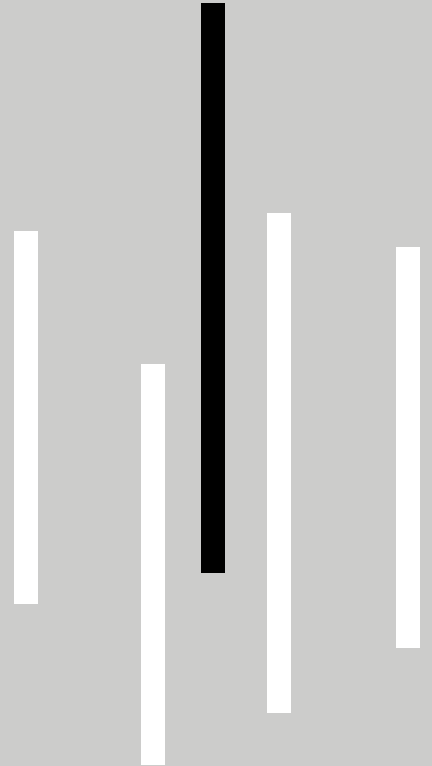
Wealth Management - Key Quarterly Financial Highlights

P/L SUMMARY (INR Crs)	Q4 FY24	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	YoY%
Total Wealth AUM (ex-custody)	2,66,892	2,96,442	3,18,825	3,21,605	3,51,321	31.6%
Wealth ARR AUM	1,28,171	1,41,635	1,56,849	1,62,749	1,62,433	26.7%
<i>360 ONE Plus (DPMS / NDPMS-RIA)</i>	<i>44,781</i>	<i>50,818</i>	<i>55,993</i>	<i>59,053</i>	<i>62,212</i>	<i>38.9%</i>
<i>Distribution Assets</i>	<i>76,960</i>	<i>84,331</i>	<i>94,055</i>	<i>95,646</i>	<i>91,448</i>	<i>18.8%</i>
<i>Lending Book</i>	<i>6,430</i>	<i>6,485</i>	<i>6,800</i>	<i>8,050</i>	<i>8,773</i>	<i>36.4%</i>
Transaction & Broking (TBR ex-custody)	1,38,720	1,54,807	1,61,976	1,58,856	1,88,888	36.2%
Average ARR AUM	1,20,893	1,32,932	1,50,074	1,57,573	1,59,861	32.2%
ARR Retention	0.76%	0.71%	0.68%	0.73%	0.80%	-
ARR Net Flows	5,697	4,679	8,391	5,940	3,324	-
Average TBR AUM	1,41,931	1,45,774	1,54,889	1,60,278	1,71,911	21.1%
TBR Retention	0.61%	0.62%	0.49%	0.45%	0.35%	-
<i>Annual Recurring Revenue</i>	<i>229</i>	<i>237</i>	<i>258</i>	<i>289</i>	<i>317</i>	<i>38.6%</i>
<i>Transaction & Brokerage Income</i>	<i>216</i>	<i>225</i>	<i>191</i>	<i>179</i>	<i>150</i>	<i>-30.8%</i>
Revenue from Operations	445	462	449	468	467	4.9%
Other Income	45	87	26	59	5	-88.8%
Total Revenue	490	549	475	527	472	-3.7%
Costs	237	209	234	251	256	8.2%
Operating PBT	208	253	215	217	210	1.1%
Profit before Taxes (PBT)	253	340	241	276	215	-14.9%
<i>Cost to Income</i>	<i>48.3%</i>	<i>38.0%</i>	<i>49.2%</i>	<i>47.6%</i>	<i>54.3%</i>	<i>-</i>
Custody AUM	1,27,769	1,45,114	1,64,777	1,72,368	1,45,782	-

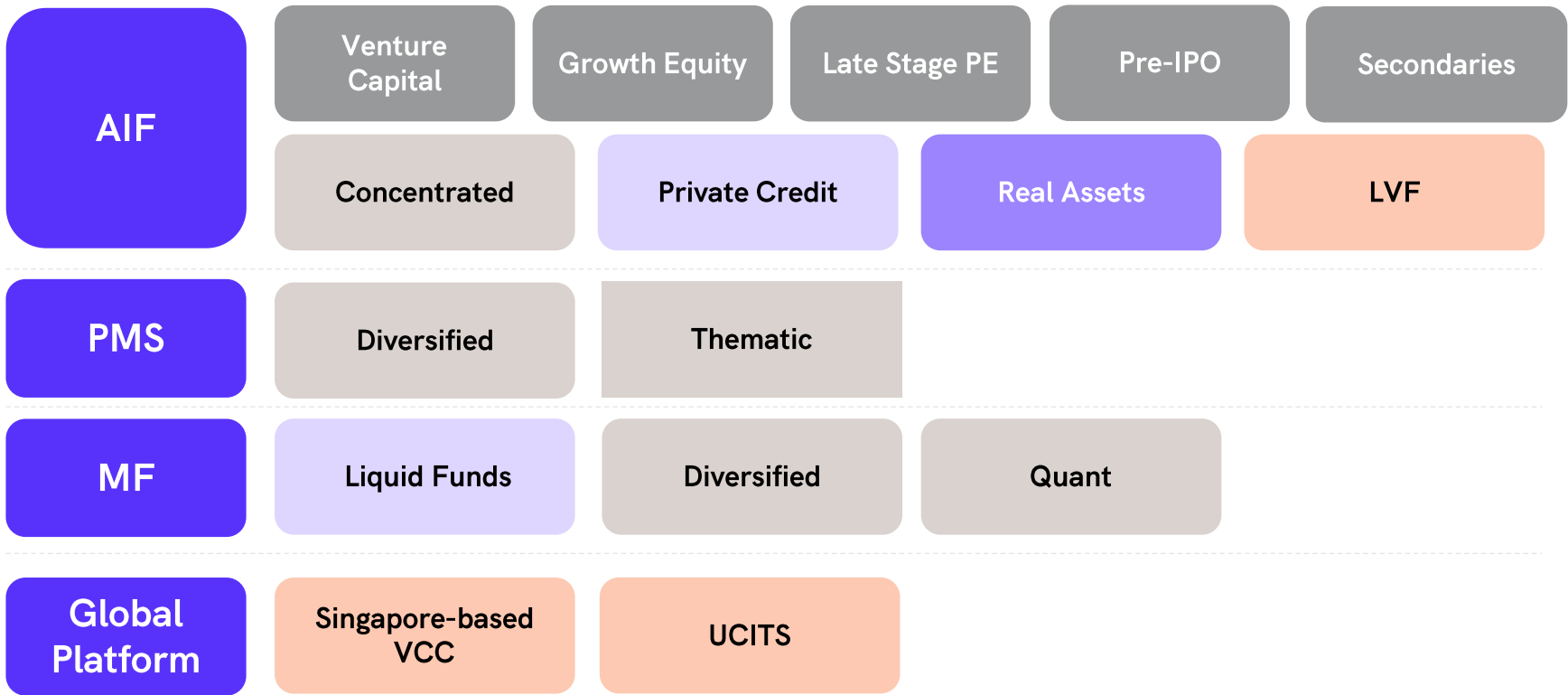
* Q4 FY25 Wealth Management data includes ET Money results for the relevant period (AUM – INR 33,055 Crs; ARR Net Flows – INR 1,757 Crs)

Asset Management

An Overview



360 ONE Asset - Pioneer and leader in alternate asset management in India



360 ONE Asset has demonstrated ability to operate effectively throughout varying market cycles and has successfully expanded the range of products across AIFs, PMS and MFs

Indian Alternatives market is still in its nascent phase, both in terms of strategies implemented and AUM allocated to these strategies. Given 360 ONE Asset’s **diversified range of strategies** as well as its **strong position and platform** within this domain, the Company is best placed to address the significant growth opportunities

Total AUM: INR 84,395 Crs
across various strategies
(as of March 31, 2025)



Product innovation, institutional mandates and domestic distribution are key focus areas for the business

1. Driving expansion in institutional relationships

- Robust traction from global institutional clients driven by our standing as a diligent and systematic fund manager
- Currently, managing mandates from institutional clients including endowment, pension, and sovereign wealth funds through listed strategies
- Focused on expanding institutional client base in our alternates strategies

**Strong Performance Track
Record**

**Strong team of 70+
Investment professionals
across strategies**

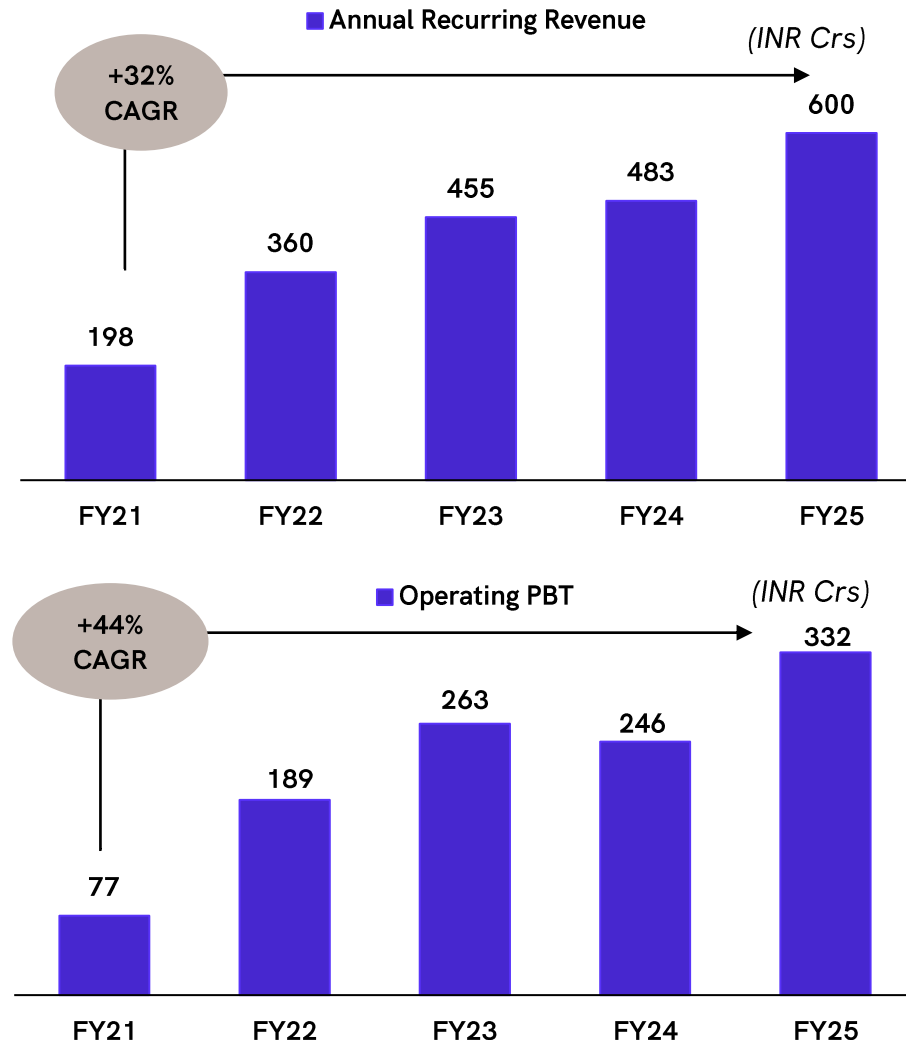
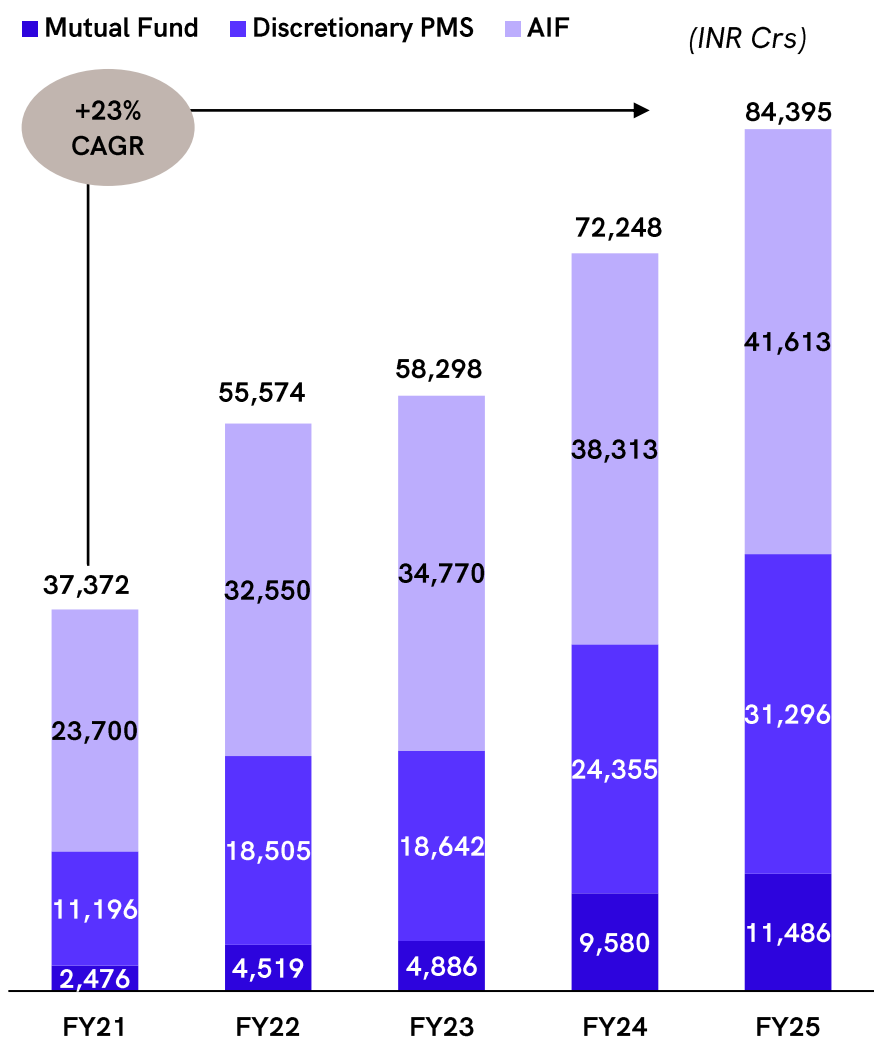
2. Focus on product innovation and new fund strategies

- Leading player in launching funds in the pre-IPO and Secondaries space
- Full spectrum funds ranging from VC / early stage to pre-IPO / secondaries to listed strategies
- Key sector themes include Healthcare, Consumer, Financials, Technology and Industrials

3. Deepening of domestic channel partner relationships

- Continued investment towards expansion of distribution base by leveraging on strong performance track record
- Deep synergies with the Wealth proposition as Alternates are a key investment avenue for UHNI / HNI clients
- Consistent increase in distribution coverage with ~37K empanelled partners (added 3,400+ partners in FY25)

Asset Management - Story in Charts



- Uniquely positioned from seed stage to pre-IPO, credit and real assets spanning the capital needs of private and public businesses
- Building on a rigorous, process-driven offering focused on select areas of strength
- Deep domain knowledge fuelled by macro tailwinds for India
- Attractive segments where we bring strong experience (such as Real Estate and Infrastructure)

Asset Management - Key Annual Financial Highlights

P/L SUMMARY (INR Crs)	FY21	FY22	FY23	FY24	FY25	CAGR %
Total Asset Management AUM	37,372	55,574	58,298	72,248	84,395	23%
<i>Alternative Investment Fund</i>	<i>23,700</i>	<i>32,550</i>	<i>34,770</i>	<i>38,313</i>	<i>41,613</i>	<i>15%</i>
<i>Discretionary PMS</i>	<i>11,196</i>	<i>18,505</i>	<i>18,642</i>	<i>24,355</i>	<i>31,296</i>	<i>29%</i>
<i>Mutual Fund</i>	<i>2,476</i>	<i>4,519</i>	<i>4,886</i>	<i>9,580</i>	<i>11,486</i>	<i>47%</i>
Average ARR AUM	28,437	49,211	56,629	65,336	81,500	30%
ARR Retention	0.70%	0.73%	0.80%	0.74%	0.74%	-
ARR Net Flows	8,957	11,957	5,435	421	3,640	-
No. of Folios	84,009	1,65,063	1,67,832	1,89,366	2,29,360	29%
No. of Investment Professionals	34	46	47	62	72	-
<i>Annual Recurring Revenue*</i>	<i>198</i>	<i>360</i>	<i>455</i>	<i>483</i>	<i>600</i>	<i>32%</i>
<i>Other Income</i>	<i>22</i>	<i>26</i>	<i>1</i>	<i>13</i>	<i>29</i>	<i>7%</i>
Total Revenue	220	386	456	496	629	30%
Costs	121	171	191	238	268	22%
Operating PBT	77	189	263	246	332	44%
Profit before Taxes (PBT)	99	215	264	259	361	38%
<i>Cost to Income</i>	<i>54.9%</i>	<i>44.3%</i>	<i>42.0%</i>	<i>47.9%</i>	<i>42.6%</i>	<i>-</i>

*Annual Recurring Revenue includes performance fees from Institutional Mandates

Asset Management - Key Quarterly Financial Highlights

P/L SUMMARY (INR Crs)	Q4 FY24	Q1 FY25	Q2 FY25	Q3 FY25	Q4 FY25	YoY%
Total Asset Management AUM	72,248	79,652	85,770	85,250	84,395	16.8%
<i>Alternative Investment Fund</i>	<i>38,313</i>	<i>40,118</i>	<i>40,180</i>	<i>41,701</i>	<i>41,613</i>	<i>8.6%</i>
<i>Discretionary PMS</i>	<i>24,355</i>	<i>28,258</i>	<i>33,247</i>	<i>31,952</i>	<i>31,296</i>	<i>28.5%</i>
<i>Mutual Fund</i>	<i>9,580</i>	<i>11,276</i>	<i>12,343</i>	<i>11,597</i>	<i>11,486</i>	<i>19.9%</i>
Average ARR AUM	69,785	75,530	82,708	84,211	83,552	19.7%
ARR Retention	0.74%	0.74%	0.67%	0.65%	0.90%	-
ARR Net Flows	189	871	1,395	703	671	-
<i>Annual Recurring Revenue*</i>	<i>128</i>	<i>139</i>	<i>139</i>	<i>137</i>	<i>185</i>	<i>44.5%</i>
<i>Other Income</i>	<i>5</i>	<i>10</i>	<i>4</i>	<i>14</i>	<i>2</i>	<i>-70.1%</i>
Total Revenue	133	149	143	151	187	40.2%
Costs	63	56	65	69	78	22.8%
Operating PBT	65	82	74	68	107	65.8%
Profit before Taxes (PBT)	70	92	78	82	109	56.0%
<i>Cost to Income</i>	<i>47.6%</i>	<i>37.9%</i>	<i>45.7%</i>	<i>45.5%</i>	<i>41.7%</i>	<i>-</i>

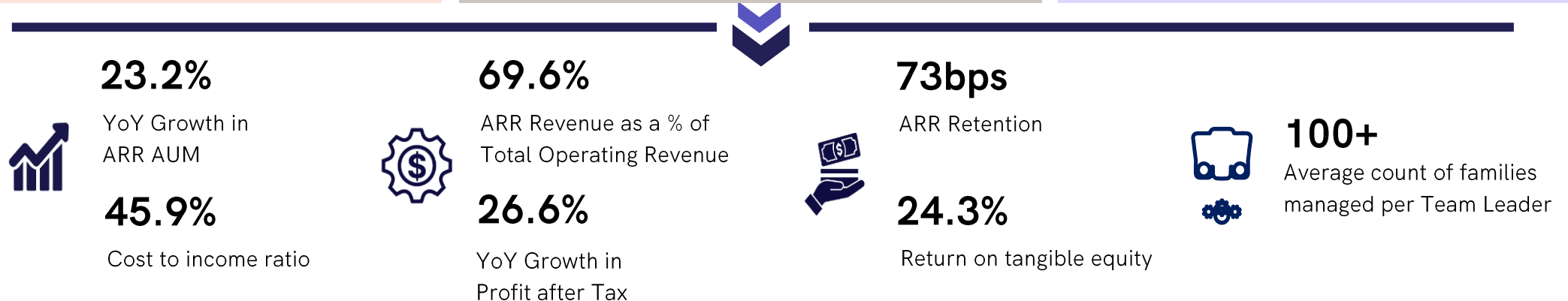
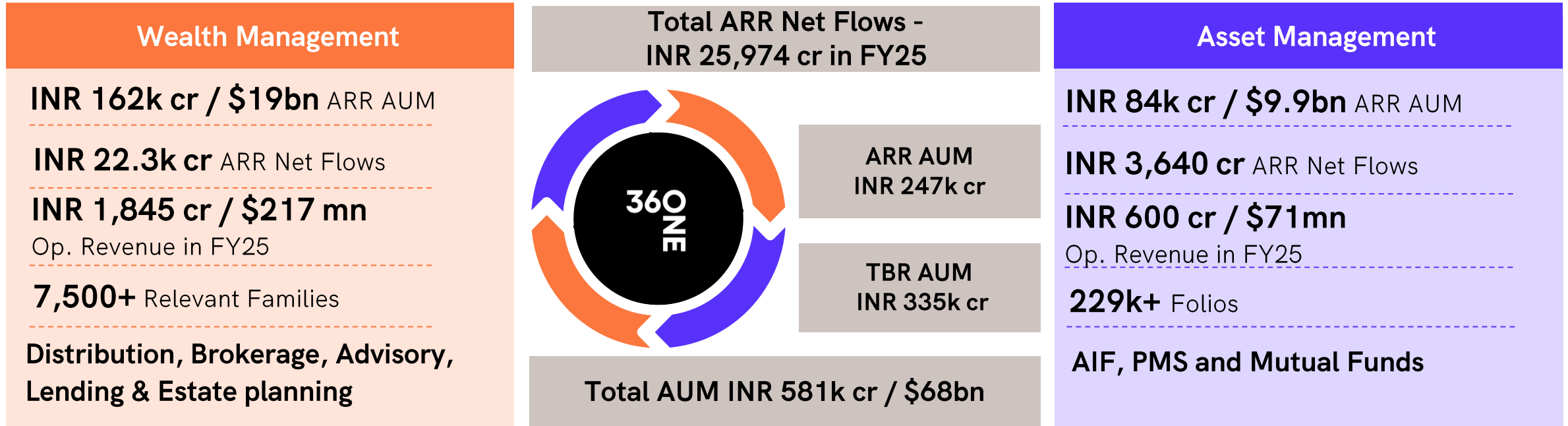
*Annual Recurring Revenue includes performance fees from Institutional Mandates

AGENDA

1. 360 ONE at a Glance
2. Business Introduction
- 3. Financial Update - Q4 and Full Year FY25**
4. Strategic Collaboration - UBS AG & 360 ONE WAM



Business Snapshot - FY25



Key Financial Highlights (1/2)



AUM

- Continued focus on ARR AUM at INR 2,46,828 Crs up 23.2% YoY
- ARR Net flows for FY25 were INR 25,974 Crs vs. INR 16,136 Crs in FY24
- Total AUM up 24.5% YoY at INR 5,81,498 Crs
- As on March 2025, clients, having AUM of INR 10 Crs+, stood at 3,324 and account for 95% of Wealth AUM (excl. custody)



REVENUES

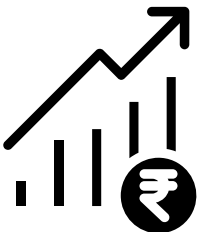
- Q4 FY25 ARR Revenue is up 40.7% YoY at INR 502 Crs, and up 28.2% YoY at INR 1,701 Crs in FY25, led by growth in assets across business segments
- Revenue from Operations for Q4 FY25 is up 13.7% YoY at INR 652 Crs, and up 32.5% YoY at INR 2,446 Crs for FY25
- Total Revenues for Q4 FY25 are up 5.7% YoY at INR 658 Crs and 35.0% YoY at INR 2,652 Crs for FY25

Key Financial Highlights (2/2)



COST

- Total Costs in FY25 increased to INR 1,218 Crs (+27.3% YoY)
- Employee costs stood at INR 912 Crs (+28.6% YoY), while Administrative costs at INR 306 Crs (+23.5% YoY)
- Cost to Income ratio stood at 45.9% in FY25 vis-à-vis 48.7% in FY24



PROFIT

- Operating PBT for Q4 FY25 is up 16.4% YoY at Rs 318 Crs, and up 38.1% at Rs 1,228 Crs for FY25
- PBT for Q4 FY25 is up 0.4% YoY at INR 324 Crs, and up 30.6% at INR 1,317 Crs for FY25
- PAT for Q4 FY25 is at INR 250 Crs (+3.6% YoY), and up 26.6% YoY at INR 1,015 Crs for FY25
- Tangible RoE is at 24.3% in FY25 vis-à-vis 30.1% in FY24

Consolidated Business Summary

Particulars (INR Crs)	Q4 FY25	Q3 FY25	QoQ %	Q4 FY24	YoY %	FY25	FY24	YoY %
ANNUAL RECURRING REVENUE ASSETS	2,46,828	2,47,999	-0.5%	2,00,419	23.2%	2,46,828	2,00,419	23.2%
REVENUE	658	678	-2.9%	623	5.7%	2,652	1,965	35.0%
Annual Recurring Revenue	502	426	17.8%	357	40.7%	1,701	1,327	28.2%
Transactional / Brokerage Revenue	150	179	-16.3%	216	-30.8%	744	519	43.6%
Total Revenue from Operations	652	605	7.7%	573	13.7%	2,446	1,846	32.5%
Other Income	7	73	-91.1%	50	-86.9%	206	119	72.7%
RETENTION								
Average ARR Assets	2,43,414	2,41,784	0.7%	1,90,678	27.7%	2,31,610	1,73,945	33.2%
Retention on ARR Assets	0.84%	0.70%	-	0.75%	-	0.73%	0.76%	-
Retention on ARR Assets (ex-Carry)	0.74%	0.68%	-	0.70%	-	0.69%	0.70%	-
COSTS	334	319	4.6%	300	11.3%	1,218	956	27.3%
Employee Costs	254	240	5.5%	225	12.7%	912	709	28.6%
Fixed Cost	150	148	1.0%	130	15.3%	587	484	21.3%
Variable Cost	104	92	12.9%	95	9.1%	325	225	44.4%
Admin and Other Expenses	80	79	1.8%	75	7.1%	306	247	23.5%
PROFIT METRICS								
Operating Profit before Taxes (OPBT)	318	286	11.2%	273	16.4%	1,228	889	38.1%
PBT	324	359	-9.6%	323	0.4%	1,317	1,009	30.6%
Profit After Tax (PAT incl. OCI & FCTR)	250	275	-9.1%	241	3.6%	1,015	802	26.6%
Cost to Income Ratio	50.7%	47.1%	-	48.2%	-	45.9%	48.7%	-
ROE	15.0%	21.0%	-	28.6%	-	20.7%	24.4%	-
ROE Ex Goodwill & Intangibles	17.1%	24.1%	-	35.2%	-	24.3%	30.1%	-

Segmental Business Snapshot - Annual

Particulars (INR Crs)	ARR AUM		ARR NET FLOWS		ARR REVENUE		ARR RETENTION	
	FY24	FY25	FY24	FY25	FY24	FY25	FY24	FY25
Wealth Management	1,28,171	1,62,433	15,714	22,334	844	1,101	0.78%	0.73%
Asset Management	72,248	84,395	421	3,640	483	600	0.74%	0.74%
Total	2,00,419	2,46,828	16,136	25,974	1,327	1,701	0.76%	0.73%

INR Crs`	WEALTH MANAGEMENT					ASSET MANAGEMENT		TOTAL	
	UHNI SEGMENT		HNI SEGMENT	GLOBAL	ET MONEY				
	FY24	FY25	FY25	FY25	FY25	FY24	FY25	FY24	FY25
Revenue from Operations	1,362	1,836	1.2	3	6	483	600	1,846	2,446
ARR Revenue	844	1,094	0.3	3	4	483	600	1,327	1,701
TBR Revenue	519	741	1.0	-	2	-	-	519	744
Other Income	107	177	-	-	-	13	29	119	206
Cost	719	846	44	53	6	238	268	956	1,218
PBT	750	1,167	-42	-51	-1	259	361	1,009	1,434

Segmental Business Snapshot - Quarterly

Particulars (INR Crs)	ARR AUM		ARR NET FLOWS		ARR REVENUE		ARR RETENTION	
	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25
Wealth Management	1,62,749	1,62,433	5,940	3,324	289	317	0.73%	0.80%
Asset Management	85,250	84,395	703	671	137	185	0.65%	0.90%
Total	2,47,999	2,46,828	6,643	3,995	426	502	0.70%	0.84%

INR Crs	WEALTH MANAGEMENT							ASSET MANAGEMENT		TOTAL	
	UHNI SEGMENT		HNI SEGMENT		GLOBAL		ET MONEY				
	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25	Q4 FY25	Q3 FY25	Q4 FY25	Q3 FY25	Q4 FY25
Revenue from Operations	467	459	0.1	1.1	1	1	6	137	185	605	652
<i>ARR Revenue</i>	<i>288</i>	<i>313</i>	<i>0.1</i>	<i>0.1</i>	<i>1</i>	<i>1</i>	<i>4</i>	<i>137</i>	<i>185</i>	<i>426</i>	<i>502</i>
<i>TBR Revenue</i>	<i>179</i>	<i>147</i>	<i>-</i>	<i>1.0</i>	<i>-</i>	<i>-</i>	<i>2</i>	<i>-</i>	<i>-</i>	<i>179</i>	<i>150</i>
Other Income	59	5	-	-	-	-	-	14	2	73	7
Cost	225	224	11	12	14	14	6	69	78	319	334
PBT	301	240	-11	-11	-13	-13	-1	82	109	359	324

ARR AUM Build-Up

Financial Performance - Q4 and Full Year FY25



ARR AUM Build-up - Across Business Segments & Asset Classes - Annual

Particulars (INR Crs)	ARR AUM Build up - FY25			
	Opening AUM	Net Flows	MTM	Closing AUM
TOTAL ARR	2,00,419	25,974	20,435	2,46,828
Wealth ARR	1,28,171	22,334	11,928	1,62,433
<i>360 ONE Plus (DPMS / NDPMS-RIA)</i>	<i>44,781</i>	<i>12,441</i>	<i>4,990</i>	<i>62,212</i>
<i>Distribution Assets Earning Trail Fees</i>	<i>76,960</i>	<i>7,550</i>	<i>6,938</i>	<i>91,448</i>
<i>Lending Book</i>	<i>6,430</i>	<i>2,343</i>	<i>-</i>	<i>8,773</i>
AMC ARR	72,248	3,640	8,507	84,395
<i>Listed Equity</i>	<i>35,203</i>	<i>3,439</i>	<i>3,900</i>	<i>42,543</i>
<i>Private Equity</i>	<i>22,140</i>	<i>-39</i>	<i>3,577</i>	<i>25,677</i>
<i>Credit & Hybrid</i>	<i>7,726</i>	<i>-118</i>	<i>588</i>	<i>8,196</i>
<i>Real Assets</i>	<i>4,293</i>	<i>-204</i>	<i>-68</i>	<i>4,021</i>
<i>Customized Multi Asset</i>	<i>2,073</i>	<i>427</i>	<i>441</i>	<i>2,941</i>
<i>Liquid</i>	<i>814</i>	<i>134</i>	<i>68</i>	<i>1,017</i>

ARR AUM Build-up - Across Business Segments & Asset Classes - Quarterly

Particulars (INR Crs)	ARR AUM Build up - Q4 FY25			
	Opening AUM	Net Flows	MTM	Closing AUM
TOTAL ARR	2,47,999	3,995	-5,166	2,46,828
Wealth ARR	1,62,749	3,324	-3,640	1,62,433
<i>360 ONE Plus (DPMS / NDPMS-RIA)</i>	<i>59,053</i>	<i>3,921</i>	<i>-762</i>	<i>62,212</i>
<i>Distribution Assets Earning Trail Fees</i>	<i>95,646</i>	<i>-1,319</i>	<i>-2,878</i>	<i>91,448</i>
<i>Lending Book</i>	<i>8,050</i>	<i>722</i>	<i>-</i>	<i>8,773</i>
AMC ARR	85,250	671	-1,526	84,395
<i>Listed Equity</i>	<i>43,605</i>	<i>173</i>	<i>-1,235</i>	<i>42,543</i>
<i>Private Equity</i>	<i>25,365</i>	<i>663</i>	<i>-350</i>	<i>25,677</i>
<i>Credit & Hybrid</i>	<i>8,489</i>	<i>-372</i>	<i>79</i>	<i>8,196</i>
<i>Real Assets</i>	<i>4,105</i>	<i>-24</i>	<i>-60</i>	<i>4,021</i>
<i>Customized Multi Asset</i>	<i>2,840</i>	<i>86</i>	<i>15</i>	<i>2,941</i>
<i>Liquid</i>	<i>846</i>	<i>146</i>	<i>25</i>	<i>1,017</i>

ARR AUM Segmental Snapshot - Wealth Management - Annual

PRODUCTS (INR Crs)	ARR AUM Build up - FY25				Revenue Build up - FY25		
	Opening AUM	Net Flows	MTM	Closing AUM	Average AUM	Retentions	Revenue
TOTAL ARR	1,28,171	22,334	11,928	1,62,433	1,50,110	0.73%	1,101
360 ONE Plus	44,781	12,441	4,990	62,212	53,213	0.32%	168
<i>Discretionary (PMS)</i>	<i>9,608</i>	<i>-</i>	<i>-</i>	<i>11,401</i>	<i>10,548</i>	<i>0.46%</i>	<i>49</i>
<i>Non-discretionary (RIA / PMS)</i>	<i>35,174</i>	<i>-</i>	<i>-</i>	<i>50,812</i>	<i>42,665</i>	<i>0.28%</i>	<i>119</i>
Distribution Assets Earning Trail Fees	76,960	7,550	6,938	91,448	89,695	0.61%	548
<i>Mutual Funds</i>	<i>36,366</i>	<i>-</i>	<i>-</i>	<i>40,275</i>	<i>41,686</i>	<i>0.45%</i>	<i>189</i>
<i>Managed Accounts</i>	<i>40,594</i>	<i>-</i>	<i>-</i>	<i>51,173</i>	<i>48,009</i>	<i>0.75%</i>	<i>359</i>
Lending Book	6,430	2,343	-	8,773	7,202	5.35%	385

ARR AUM Segmental Snapshot - Wealth Management - Quarterly

PRODUCTS (INR Crs)	ARR AUM Build up - Q4 FY25				Revenue Build up - Q4 FY25		
	Opening AUM	Net Flows	MTM	Closing AUM	Average AUM	Retentions	Revenue
TOTAL ARR	1,62,749	3,324	-3,640	1,62,433	1,59,861	0.80%	317
360 ONE Plus	59,053	3,921	-762	62,212	58,220	0.34%	48
<i>Discretionary (PMS)</i>	<i>11,241</i>	<i>-</i>	<i>-</i>	<i>11,401</i>	<i>11,254</i>	<i>0.52%</i>	<i>14</i>
<i>Non-discretionary (RIA / PMS)</i>	<i>47,812</i>	<i>-</i>	<i>-</i>	<i>50,812</i>	<i>46,966</i>	<i>0.29%</i>	<i>34</i>
Distribution Assets Earning Trail Fees	95,646	-1,319	-2,878	91,448	93,230	0.65%	150
<i>Mutual Funds</i>	<i>42,911</i>	<i>-</i>	<i>-</i>	<i>40,275</i>	<i>41,784</i>	<i>0.47%</i>	<i>48</i>
<i>Managed Accounts</i>	<i>52,735</i>	<i>-</i>	<i>-</i>	<i>51,173</i>	<i>51,446</i>	<i>0.81%</i>	<i>102</i>
Lending Book	8,050	722	-	8,773	8,412	5.72%	119

ARR AUM Segmental Snapshot - Asset Management - Annual

ASSET MANAGEMENT (INR Crs)	ARR AUM Build up - FY25					Revenue Build Up - FY25		
	Opening AUM	Gross Flows	Net Flows	MTM	Closing AUM	Average AUM	Retentions	Revenue
TOTAL ARR	72,248	16,297	3,640	8,507	84,395	81,500	0.74%	600
Discretionary Portfolio Manager	24,355	6,014	3,194	3,748	31,296	30,223	0.59%	179
Standardized	6,310	-	-	-	7,527	7,659	0.85%	65
Institutional Mandates [#]	18,044	-	-	-	23,768	22,564	0.51%	114
Alternate Investment Manager	38,313	6,834	-885	4,185	41,613	39,958	0.93%	372
Listed Equity	3,632	-	-	-	3,700	3,854	1.73%	67
Private Equity	22,134	-	-	-	24,546	22,701	0.98%	221
Credit & Real Assets	10,475	-	-	-	10,426	10,731	0.67%	72
Customized Multi-Asset	2,073	-	-	-	2,941	2,672	0.45%	12
Mutual Fund Manager*	9,580	3,449	1,331	574	11,486	11,319	0.43%	49
Listed Equity	7,422	-	-	-	8,907	8,902	0.50%	45
Debt & Hybrid	1,345	-	-	-	1,562	1,536	0.22%	3
Liquid Funds	814	-	-	-	1,017	881	0.11%	1

*Gross Flows in Mutual Fund segment excludes Liquid Funds; [#]Revenue includes performance fees

ARR AUM Segmental Snapshot - Asset Management - Quarterly

ASSET MANAGEMENT (INR Crs)	ARR AUM Build up - Q4 FY25					Revenue Build Up - Q4 FY25		
	Opening AUM	Gross Flows	Net Flows	MTM	Closing AUM	Average AUM	Retentions	Revenue
TOTAL ARR	85,250	2,083	671	-1,526	84,395	83,552	0.90%	185
Discretionary Portfolio Manager	31,952	176	-92	-565	31,296	30,876	1.01%	77
Standardized	7,954	-	-	-	7,527	7,514	0.91%	17
Institutional Mandates [#]	23,998	-	-	-	23,768	23,361	1.04%	60
Alternate Investment Manager	41,701	1,269	402	-490	41,613	41,338	0.95%	97
Listed Equity	3,903	-	-	-	3,700	3,693	1.55%	14
Private Equity	24,178	-	-	-	24,546	23,890	1.06%	62
Credit & Real Assets	10,780	-	-	-	10,426	10,818	0.63%	17
Customized Multi-Asset	2,840	-	-	-	2,941	2,938	0.49%	4
Mutual Fund Manager*	11,597	637	361	-472	11,486	11,339	0.42%	12
Listed Equity	9,149	-	-	-	8,907	8,767	0.48%	10
Debt & Hybrid	1,601	-	-	-	1,562	1,559	0.29%	1.1
Liquid Funds	846	-	-	-	1,017	1,013	0.11%	0.3

*Gross Flows in Mutual Fund segment excludes Liquid Funds; [#]Revenue includes performance fees

Capital Allocation & Dividend History

<u>Net Worth</u>	
Tangible	6,045 Crs
Wealth Management	1,481 Crs
Lending	2,874 Crs
Asset Management	1,341 Crs
Fixed Assets	350 Crs
+	
Goodwill + Intangibles	1,020 Crs
Total	7,065 Crs

<u>Consistent Dividend History</u>	
Time period	INR / share
Total FY22	13.8
Total FY23	17.3
Total FY24	16.5
Total FY25	6.0
Total FY26 till date	6.0
First Interim Dividend (April 2025)	6.0
FY25: RoE - 20.7%; Tangible RoE - 24.3%	

Acquisition of B&K Securities - One of India's leading brokerage and corporate advisory houses

Business Highlights

- 300+ institutional broking clients across DII and FIIs
- 450+ mid and small cap companies under coverage
- 90%+ share of cash segment in broking revenue
- Equity turnover (cash segment) at INR 2,448 billion (+76% YoY) in FY25

Regulatory and Other updates post signing in January 2025

- Approval related to Merchant Banking license received
- Approvals related to Stock Broking, Research Analyst and CCI awaited
- B&K's resilient business model is driven by strong, recurring revenue streams
- Business continues to receive positive traction across segments despite overall market volatility
- Acquisition received encouraging response from B&K's leadership team, clients and other stakeholders

B&K Securities - EPS accretive on an as-is basis; significant potential ahead

INR Crs.	360 ONE WAM	B&K Securities*	Combined**
FY25 Total Revenue	2,652	281	2,933
FY25 PAT	1,015	102	1,117
FY25 Diluted EPS (INR)	26.1	-	27.6
EPS accretion (as-is basis)			6%
No. of 360 ONE WAM's shares (Diluted) as on March 31, 2025			38.93 Crs.
No. of 360 ONE WAM's shares (Diluted) pursuant to the acquisition			40.46 Crs.

Acquisition strengthens 360 ONE's position as a market leader, enabling integration of research, advisory, and execution capabilities across a wider spectrum of services and new market segments

- Transaction plays an important part in completing 360 ONE's wealth and asset management platform
- Strong equity brokerage proposition for HNI clients
- Addition of IB capabilities will aid in catering to the needs of UHNI Promoter families across all parts of their cap table
- Addition of new lines of revenue to lead to more diversity and stability to 360 ONE's income profile

*Based on B&K Securities and B&K Finserv's provisional FY25 financials; ** Proforma calculation

AGENDA

1. 360 ONE at a Glance
2. Business Introduction
3. Financial Update - Q4 and Full Year FY25
- 4. Strategic Collaboration - UBS AG & 360 ONE WAM**



UBS AG + 360 ONE WAM: An Exclusive Strategic Collaboration

UBS AG

- › Leading and **truly global WM firm**, diversified AM solutions and focused IB capabilities
- › Strong **global footprint; access to top families and billionaires worldwide**
- › Focus on **UHNH clients** (>\$50m AUM)
- › Established NRI franchise across key global hubs, with **ambition to scale up India onshore and offshore**

360 ONE WAM

- › India's **largest independent WM and leading alternates-focused AM firm**
- › Wide **India footprint**; access to top 5,000 families
- › Focus on **U/HNI clients** (>\$1m AUM)
- › Strategic **focus on discretionary and advisory** proposition; supplemented with non-investment capabilities (lending, structuring and estate planning)

An Aligned Value Proposition



Client interest first – open architecture



Focus on CIO and advisory proposition



Holistic and best-in-class on/offshore coverage for top clients



Derived Synergies from Asset Management and Investment Banking



Diverse engagement models tailored to different needs across wealth segments



Ability to hire and retain the best talent

360 ONE WAM and UBS AG enter into an exclusive collaboration for India & Global Indian Clients.

Transaction Structure

1

Strategic Collaboration

1. Exclusive strategic collaboration between UBS AG and 360 ONE WAM
2. Clients from both institutions will have access to onshore and offshore wealth management solutions
3. Potential synergies in other business lines (Asset Management, IB)

Enables resident Indian & Global clients to get access to a wide global proposition as well as onshore India markets, through a comprehensive wealth and asset offering

2

4.95% Stake in 360 ONE WAM

1. UBS AG to acquire warrants upto 4.95% in 360 ONE WAM for a price of INR 1,030 - a premium of 14% over 3-day VWAP as on relevant date (April 17, 2025)
2. Total consideration of INR 2,112 Crs for 2.05 Crs convertible warrants

With this collaboration, UBS & 360 ONE establish a differentiated offering in a fast growing onshore market

3

UBS' India Business Acquisition

1. 360 ONE WAM to acquire UBS India Onshore business for a total consideration of INR 307 Crs
2. 3 Business/ Asset Transfer Agreements covering Distribution & Broking business, PMS and Loan book
3. Includes full transfer of clients and employees to 360 ONE WAM
4. Active AUM is approx. INR 26,000 Crs with net revenue of approx. INR 75 Crs

Revenue and Net Flows upside through uplift of the India business and synergies due to the collaboration agreement

Summary of the Collaboration

Key Tenets of Collaboration



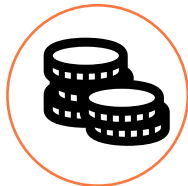
UBS - Exclusive “global” collaboration with 360 ONE

Supported by growing demand for global investment opportunities, 360 ONE’s domestic as well as global clients will benefit from UBS’ global offerings



360 ONE - Exclusive “domestic” collaboration with UBS

UBS’ global clients will get access to India’s promising investment ecosystem through 360 ONE’s industry-leading wealth proposition



AM and IB Synergies

On a best-effort basis, UBS will promote distribution of 360 ONE AM’s funds to its global clientele and explore opportunities for global syndication with its AM arm

Other Areas



Absorb mutual best practices on proposition, research and analytics and RM development



Deepening of UBS’s India Business through 360 ONE’s wider domestic platform



Setup Apex Committee led by senior management on both sides

** Transactions are subject to regulatory approvals*

Awards & Recognitions - Reinforcing our leadership position



INDIA'S BEST WEALTH MANAGER -
EUROMONEY GLOBAL PRIVATE
BANKING AWARDS 2025

170+

AWARDS
IN 17 YEARS

A testament to the trust of our
clients and our commitment to
excellence



BEST PRIVATE, INDIA - ASIAN
PRIVATE BANKER'S AWARDS FOR
DISTINCTION 2024



BEST PURE PLAY PRIVATE BANK - INDIA

BEST PURE PLAY PRIVATE BANK - INDIA
BY GLOBAL PRIVATE BANKING
INNOVATION AWARDS 2024



BEST STRUCTURED FINANCE HOUSE,
ASIA PACIFIC (WINNER) AND BEST
PRIVATE EQUITY HOUSE, ASIA PACIFIC
(HIGHLY COMMENDED)



BEST DOMESTIC PRIVATE BANK -
INDIA BY FINANCEASIA AWARDS
2024



WEALTHBRIEFINGASIA AWARDS
2024 - BEST NEXT-GEN
PROGRAMME



BEST PRIVATE BANK FOR HNWIS -
THE ASSET TRIPLE A PRIVATE CAPITAL
AWARDS
2022, 2023 & 2024



Link to download data book

Data reported across previous quarters is now continued to be reported in a Data Book, maintained in an excel format on our website. The Link for the data book is hosted below.

Contents of the Data Book:

1. Consolidated Data
2. Segmental - Wealth Management
3. Segmental - Asset Management
4. Consolidated Business Summary - Quarter
5. Capital Allocation
6. Annexure 1 - Annual
7. Annexure 2 - Quarterly

[Click here to access the Databook](#)

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