Desai Finance

FIRM CREDENTIALS

Your financial modelling and finance team in India.

Global Capability Centre ◆ CFO services ◆ Mutual funds ◆ Academy ◆ Mumbai

Desai Finance is the finance practice of the Desai family group. We work as a Global Capability Centre for international investors and companies, building their models, running their reporting and supporting their set-up in India, and we serve Indian businesses and families with CFO services and mutual fund distribution.

35+ yrs
of independent practice

CA · CFA
leadership; Deloitte Financial Advisory experience

CA · EU · AU
offices served in Canada, Europe and Australia

300+
students trained through the Academy

WHAT WE DO

Financial modelling & valuation
Three-statement, DCF, LBO and scenario models built to lender and investor standards

Project finance
Renewables and mining: debt sizing and sculpting, cash waterfalls, returns

GCC & India set-up
Offshore modelling and reporting team; accounting set-up and group reporting for companies entering India

Fractional & export CFO
Reporting, budgeting, cash-flow forecasting and foreign-client accounting

Power BI reporting
Automated MIS, KPI and covenant dashboards

Mutual fund distribution
Through an AMFI-registered Mutual Fund Distributor (ARN-14641)

Insurance & loans
Insurance arranged through licensed partners; loans for individuals and businesses

Desai Finance Academy
Excel, financial modelling and investment banking training

SECTOR MODELLING

- Renewables
- Mining
- Pharma & biologics
- Financial services
- Corporates entering India

WHO WE WORK WITH

- Private equity firms
- Law firms
- Family offices
- Global companies entering India
- Indian businesses & exporters
- Individuals & families

> *"Rigorous work, clear answers and quick responses, with the care of a family practice behind every engagement."*

OUR TEAM



Deepak Desai

Mutual funds, accounting & CFO services

AMFI-registered Mutual Fund Distributor (ARN-14641) with his own practice for more than 35 years. Leads accounting and CFO services, and is an Associate Certified Pranic Healer.



Rhythm Desai, CA, CFA

GCC practice lead · Academy

Chartered Accountant, CFA (all three levels cleared), with 4.5+ years at Deloitte Financial Advisory, including a deputation to Deloitte Canada. Leads the GCC practice, building it around client service, and heads the Academy.

HG

Hiten Gohil

Manager

Manages day-to-day operations and client coordination, and is a secondary point of contact.



Alka Thakkar

Wellbeing

Leads the Wellbeing vertical, with expertise in astrology and more than 10 years of pranic healing practice.

HOW WE WORK

1. **Scope** — Agree the mandate, formats and timelines
2. **Build** — Model or process, with drafts shared early
3. **Review** — Senior review and integrity checks
4. **Deliver** — Handover, walkthrough and ongoing support

ENGAGEMENT MODELS

Dedicated team
Named analysts on a monthly retainer

Project-based
Defined scope and fee

On demand
Reviews, updates and peak periods

WELLBEING

Vastu · Pranic healing · Astrology
Calm, practical guidance from the Desai family, alongside our finance work

FIND US

desaifinance.com

Mumbai, India

Tell us about your mandate.
Models, reporting, a team in India or help setting up here: we reply within 24 hours.

hello@desaifinance.com

Disclaimer: For information only; not investment advice or a recommendation on any security. Desai Finance is not registered with SEBI as an Investment Adviser, Research Analyst or Portfolio Manager. Mutual funds are distributed by Deepak Desai, AMFI-registered Mutual Fund Distributor (ARN-14641), who receives commission from asset management companies; mutual fund investments are subject to market risks, read all scheme related documents carefully. Insurance is arranged through IRDAI-licensed partners; Desai Finance is not an insurance intermediary. Wellbeing sessions complement, and do not replace, professional medical care.