



## INVEST SEARCH MONTHLY | NOVEMBER 2025 EDITION

### A NOTE FROM TEAM INVEST SEARCH

As we step into the final stretch of the year, December becomes a moment to pause and re-evaluate. Markets evolve, goals shift, and so does life. This month, our focus has been on helping you prepare for a stronger, more disciplined financial start to 2026, one step, one habit at a time.

We look forward to supporting you in turning plans into progress.

– Team Invest Search

### #KnowYourMoney:

#### Year-End Portfolio Review: Reflect, Reset & Reinvest

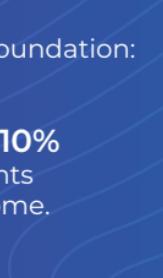
A year-end review keeps your investments aligned with your life goals. Here's a simple 4-step checklist (ideal for icons/graphics):



##### Review Your Goals

Are key milestones; education, retirement, home purchase, on track?

Did anything important change this year?



##### Check Asset Allocation

Markets may have shifted your equity-debt ratio.

Rebalancing helps keep risk in control.



##### Evaluate SIP Progress

Ensure all SIPs are active and aligned with goals.

Consider increasing contributions from January for long-term impact.



##### Reinvest Bonuses Wisely

Year-end bonuses offer a great chance to strengthen long-term investments.

Even small top-ups today compound meaningfully over the years.

*A yearly review ensures your investments stay aligned with your life and your future stays aligned with your dreams.*

### Money Mantra: Smart Financial Habits for 2026

Start the new year on a strong financial foundation:

#### Increase SIP by 10%

Let your investments grow with your income.

#### Set One Big Financial Goal for 2026

Clear goals inspire clear habits.



#### Build a 3-6 Month Emergency Fund

Peace of mind during unexpected events is invaluable.

#### Review Insurance Coverage

Protect yourself and your family before you invest.

#### Avoid Lifestyle Inflation

Spend thoughtfully so your wealth grows faster than your expenses.



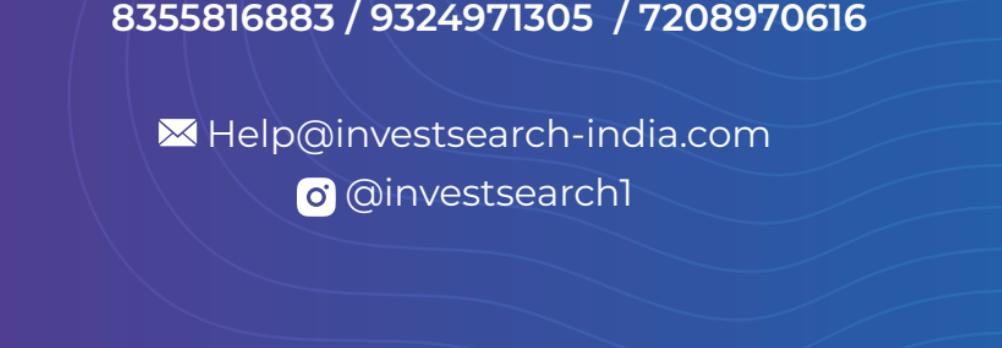
*\*Correct answer in the last page*

*That's the power of consistency, not timing. Resolutions fade. Financial discipline builds wealth.*

### Team Update: Birthday Celebration

This month, we celebrated **Meghna Sail's** birthday at the office.

A warm afternoon filled with good wishes, sweet moments, and the joy of celebrating milestones together.



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### Quote of the Month

“Think ahead. Act today. Your future self is always watching.”

### Connect With Us

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*\*Correct answer: ₹22 lakh*