

Afaqs: BankFin 360 Excellence in BFSI Marketing Awards

Category: Best Event Marketing Strategy

Kotak Private Entry: Kotak Private's Strategic Blueprint for Client Engagements

About Kotak Private

Kotak Private is the proposition of the Kotak Mahindra Group (Kotak) which offers a comprehensive and holistic platform covering the entire gamut of financial products & services for its UHNI and HNI clients comprising entrepreneurs, business families and professionals.

Kotak Private Banking, a division of Kotak Mahindra Bank, is one of the oldest and most respected private banking institutions in India. It provides end-to-end banking and investment services to its clientele, which includes 60% of India's top 100 families (*Source: Forbes India Rich List, 2024*). For over 20 years and even during uncertain and volatile times, Kotak Private Banking has maintained its leadership position in the Indian private banking industry due to its in-depth understanding of the environment, asset classes and the associated risks, as well as clients' specific requirements.

Engagement Strategy for Kotak Private Clients

At Kotak Private, our marketing strategy is anchored on two key pillars: acquisition of new clientele and the deepening of relationships with our existing High Net-Worth Individuals (HNIs) and Ultra High Net-Worth Individuals (UHNIs). While onboarding remains essential, we place equal emphasis on bespoke, thoughtfully curated engagements and experiences - a strategic approach that focuses on creating memorable, value-driven experiences. These initiatives are designed not merely to showcase our offerings, but to foster meaningful connections that help our clients Live Their Purpose—a philosophy that defines our brand and guides every touchpoint we create.

Strategic Event Evaluation Framework

To ensure optimal alignment with our brand and business objectives, we employ a strategic, weighted evaluation framework that guides our event selection and post-event analysis. This framework is designed to prioritize high-impact opportunities and ensure measurable outcomes

We follow a strategic, weighted evaluation framework to ensure that every event we participate in is aligned with our brand and business objectives. Events are carefully handpicked based on their potential to deliver meaningful impact across key dimensions. Each metric— artist popularity, audience relevance, brand visibility, premium association, lead generation potential, and relationship deepening—is assigned a specific weightage depending on the strategic goals of the event. A composite score is then derived from these weighted metrics, helping us objectively assess and prioritize opportunities. This scoring mechanism ensures that our event choices are both purposeful and performance-driven. Post-event, a

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thorough evaluation is conducted to measure the achievement of predefined goals and KPIs, assess ROI, and gather qualitative feedback. This end-to-end approach enables us to continuously refine our event strategy and maximize long-term value.

Our experiential marketing efforts and initiatives are manifested through curated engagements that fall under two key categories: Luxury, Lifestyle and Thought Leadership/Knowledge Sharing. These events are designed to resonate with the personal and professional aspirations of our clientele.

Thought Leadership & Knowledge Sharing:

High Net-Worth Individuals (HNIs) and Ultra High Net-Worth Individuals (UHNIs) are not just looking for financial services—they seek insight, foresight, and strategic guidance. Their wealth brings complexity, and with it, a need for informed decision-making across investments, legacy planning, philanthropy, and global opportunities. This is where thought leadership and knowledge-sharing events become invaluable. These clients are often industry leaders, entrepreneurs, and global citizens who value intellectual capital as much as financial capital.

Kotak Private's thought leadership and knowledge-sharing events offer HNI and UHNI clients exclusive insights into global trends, innovation, and wealth strategies. These forums foster informed decisions, expert access, peer networking, and deeper trust—empowering clients to align their wealth with purpose and thrive in a complex, evolving world

Some of our key properties and curated engagements for our clients is listed below:

Knowledge Sharing Session with Jensen Huang

As part of our commitment to thought leadership and enriching our knowledge proposition, we hosted an exclusive fireside chat with Jensen Huang, CEO of NVIDIA in collaboration with India's leading business publication. This session tailored exclusively for our Kotak Private clients presented a unique opportunity to gain insights from a global expert on emerging global trends and AI conversations, reinforcing our dedication to delivering world-class perspectives.

Interactions with Legendary Sport Icons

We at Kotak Private truly believe that each one of us have a deeper purpose in life. Our previous engagements include sessions with Harsha Bhogle & Pullela Gopichand. Pullela Gopichand is one such sporting legend who is living his purpose. We hosted our clients at the Kotak Pullela Gopichand Badminton Academy in Hyderabad, where they had the opportunity to learn and be inspired by India's badminton legend. We also did engaging sessions with Harsha Bhogle in Mumbai and Bangalore, where he shared fascinating insights from his journey, memorable World Cup moments, and personal stories from the world of cricket.

Recurring Knowledge sharing and Learnings sessions with our CEO and the leadership team

Exclusive knowledge- sharing sessions with the Leadership Team offer our clients deep market insights and strategic perspectives. These engagements strengthen client's conviction and showcase Kotak Private's thought leadership by providing insightful, expert-backed guidance. Our sessions are helmed

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by Mr. Ashok Vaswani (Managing Director of Kotak Mahindra Bank), Ms. Oisharya Das (CEO, Kotak Private Banking, Kotak Mahindra Bank), Ms. Gautami Gavankar (President, Kotak Mahindra Bank Ltd.) & Ms. Kanchi Gandhi (Managing Director, Kotak Mahindra Trusteeship Services Ltd.)

Immersive Fund sessions

Our curated fund events, in collaboration with our esteemed fund partners, are designed to equip clients with timely insights into evolving market dynamics and investment landscapes. Conducted across India, including Tier 1 and Tier 2 cities, these sessions foster well-informed, transparent perspectives on opportunities, thereby empowering clients to make confident, strategic investment decisions.

What sets these events apart is the exclusive interaction they offer with the fund owners themselves—an opportunity reserved for a select group of clientele. In these intimate, closed-door sessions, fund owners share firsthand insights into the fund's strategy, performance, and future outlook. They highlight compelling, often under-the-radar investment opportunities that are not widely accessible, offering clients a rare window into high-conviction ideas. This privileged access enables participants to gain a deeper understanding of the fund's unique value proposition and make more informed investment choices.

Women Lead Initiatives

At Kotak Private, women are not just valued clients—they represent a pivotal segment in our strategy, inspiring tailored solutions and long-term vision. We celebrate women not just as clients, but as visionaries, leaders, and changemakers in the world of finance. Below are some of the initiatives that reflect our belief that when women are empowered, they elevate families, communities, and industries. By fostering financial independence and leadership, we honor their growing influence and ensure they remain at the forefront of private banking's future.

- **HERizon** is our captivating series on Women's day, focusing on women and wealth. Senior women leadership at Kotak Private elucidate the transformative shift in the investment landscape and the pivotal role that women play in shaping it. We curate a selection of forward looking themes - from strategic investment approaches, to the critical role of bespoke service in Private Banking, the emergence of women as wealth creators, and the growing economic involvement of women in Tier 2 cities among others.
- **Leading Ladies** is our curated programme exclusively for our women clientele in an endeavor to empower them to make their own financial decisions. These are held pan India with a mix of industry stalwarts giving them an edge on various topics such as financial planning, asset allocation, equity, debt, stocks, estate planning, emotional wellness, and finding one's purpose. The topics ranged across domains, and some of the speakers included industry experts like Sridhar Sankararaman (MD, Multiples Equity), Shereen Bhan (Managing Editor, CNBC-TV18), Mithali Raj (Former Indian Cricket Captain), Sonia Shenoy (Executive Editor, CNBC-TV18), Shaanti Ekambaran (Deputy MD, Kotak Mahindra Bank Ltd.) Ashish Dhawan (Co-founder, Chrysal Capital), Chandana Ganguly (Emotional Wellness Consultant) and Sonali Bendre (former Indian actress)

NexGen Connect

NexGen is a critical focus segment at Kotak Private, representing the future of wealth creation and stewardship. Engaging this segment early fosters long-term relationships, builds brand loyalty, and ensures intergenerational wealth continuity. NexGen clients bring fresh perspectives, digital savviness, and evolving financial needs—making them key drivers of innovation and growth. In an endeavor to provide a world-class learning experience to the leaders of tomorrow, Kotak Private launched NexGen Connect for our millennial clients. This program inspires budding visionaries to scale new heights by providing exposure to the country's brightest minds in their fields. We cover varied topics spanning across asset classes, global investments, succession planning, digital trends, and learning about the markets through gamification and simulation exercises. Industry experts guide the participants in making informed investment decisions for family wealth and portfolio. Some of the speakers included industry stalwarts such as Ashwin Raguraman (Co-founder Bharat Innovation Fund), Nithya Easwaran MD- Multiples Alternate Asset Management Pvt Ltd.), Sharan Hegde (Fin-fluencer), Shikhar Dhawan (Former Indian Cricketer), Masaba Gupta (Fashion Designer), and internal experts from Kotak, including Vinit Joshi (Sr. VP, Kotak Mahindra (UK) Ltd.) Kanchi Gandhi (Managing Director, Kotak Mahindra Trusteeship Services Ltd.), Pankaj Tibrewal (Sr. EVP – Kotak Mahindra AMC), share their insights during the exclusive two-day bootcamp.

Luxury & Lifestyle

For our HNI and UHNI clients, luxury is not just about opulence—it's about exclusivity, access, and experience. These individuals are accustomed to premium services, but what truly captivates them are “money-can't-buy” experiences—those rare, curated moments of prestige and emotional connection. Kotak Private understands this deeply and integrates luxury events into its relationship strategy to offer unparalleled value beyond banking.

Kotak Private's luxury events offer clients exclusive, invitation-only experiences—from private previews to rare engagements with global icons. These engagements provide prestige, bragging rights, and emotional connection, reinforcing trust and loyalty. Carefully curated to align with each client's lifestyle and aspirations, these events go beyond banking—celebrating success, enriching lives, and enabling clients to live their purpose through access that only a privileged few enjoy in their lifetime.

Gastronomic Affairs Featuring Acclaimed Chefs and Mixologists

At Kotak Private, wealth management transcends mere numbers. It's about crafting exclusive experiences. To that end, we embarked on an extraordinary collaboration, with renowned chefs like **Marco Pierre White**, and the culinary maestro - **Chef Massimo Bottura** for curating memorable culinary experiences. The meticulously designed experience, included a LIVE cooking demonstration, tasting sessions, an insightful Q&A and a personal meet-and-greet with the chefs themselves, offering a one-of-its-kind experience for our clients. Our past engagements included a 3 city tour with Masterchef Australia judges – Gary Mehigan, George Calombaris & Matt Preston.

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Curated Partnerships with International Artists

We view concerts not merely as concerts, but as a true embodiment of luxury, music, and bespoke experience for those who seek the extraordinary. We showcased world renowned artists like Gun N' Roses, Backstreet Boys, Ed Sheeran and Maroon 5 among others. Kotak Private Lounge elevated Maroon 5's debut performance in India into an unforgettable, world-class experience. Guests were treated to a premium hospitality offering that included gourmet cuisine, signature cocktails, and seamless to-and-fro shuttle services from the VIP parking zone. Every detail was thoughtfully curated to evoke the essence of an international music festival—exclusive, immersive, and effortlessly luxurious. s.

Indigenous Indian Musical Soiree

In the past, we have hosted multiple, invite-only musical gathering, celebrating the rich legacy of Indian maestros like the legendary Lt. Ustad Zakir Hussain and Ustad Amjad Ali Khan among others. As the maestros wove their magic, guests were enveloped in an experience of cultural opulence, where artistry met exclusivity, resonating with the essence of true privilege.

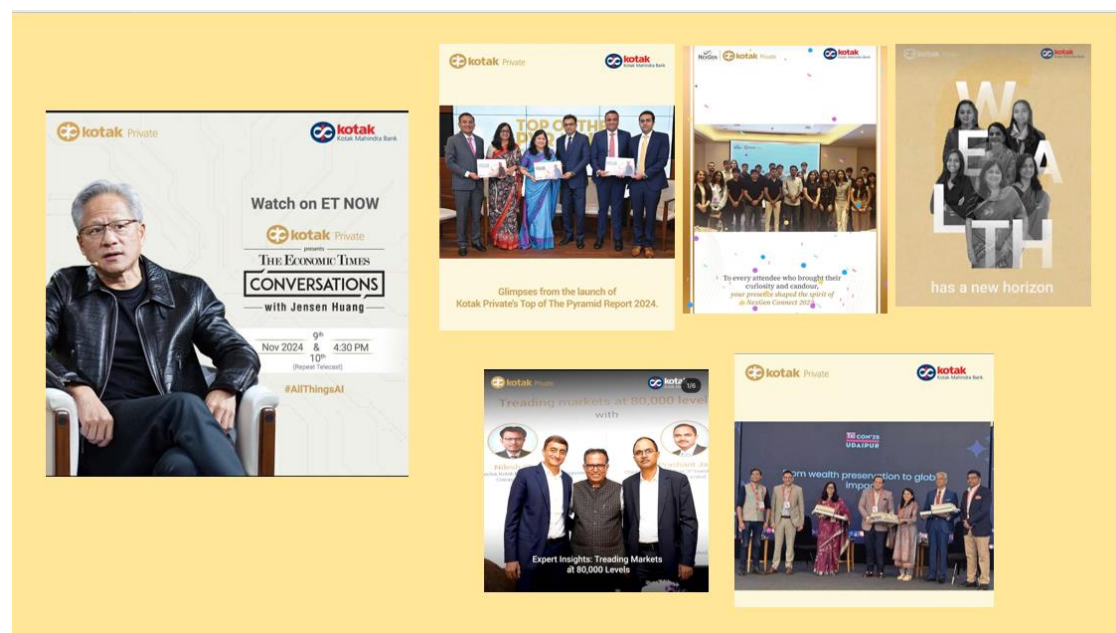
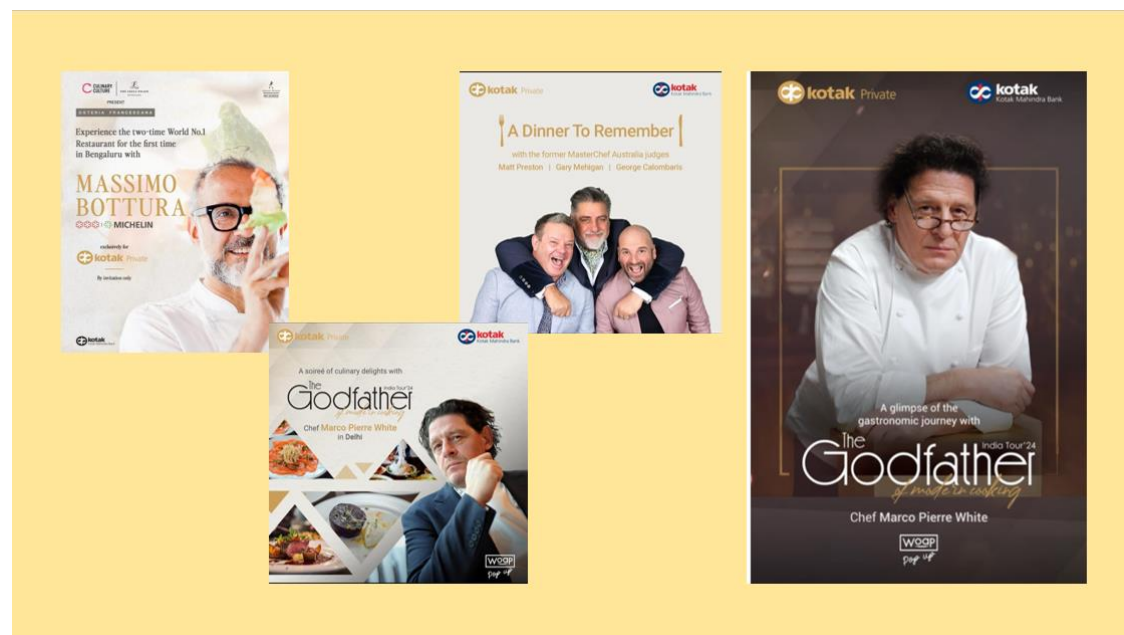
Mindscapes with Mentalist Nicolai Friedrich

Kotak Private hosted an unforgettable evening for our esteemed clients in Pune featuring the internationally acclaimed German mentalist and illusionist, Nicolai Friedrich. Clients were left in awe as Nicolai blurred the lines between reality and imagination, delivering a performance that was both intellectually stimulating and wildly entertaining. Designed to be enjoyed by families together, the experience ensured an evening of shared memories and meaningful moments. The event was a resounding success reaffirming Kotak Private's commitment to curating exclusive, world-class experiences for our valued clientele

Collaborative Art Showcases

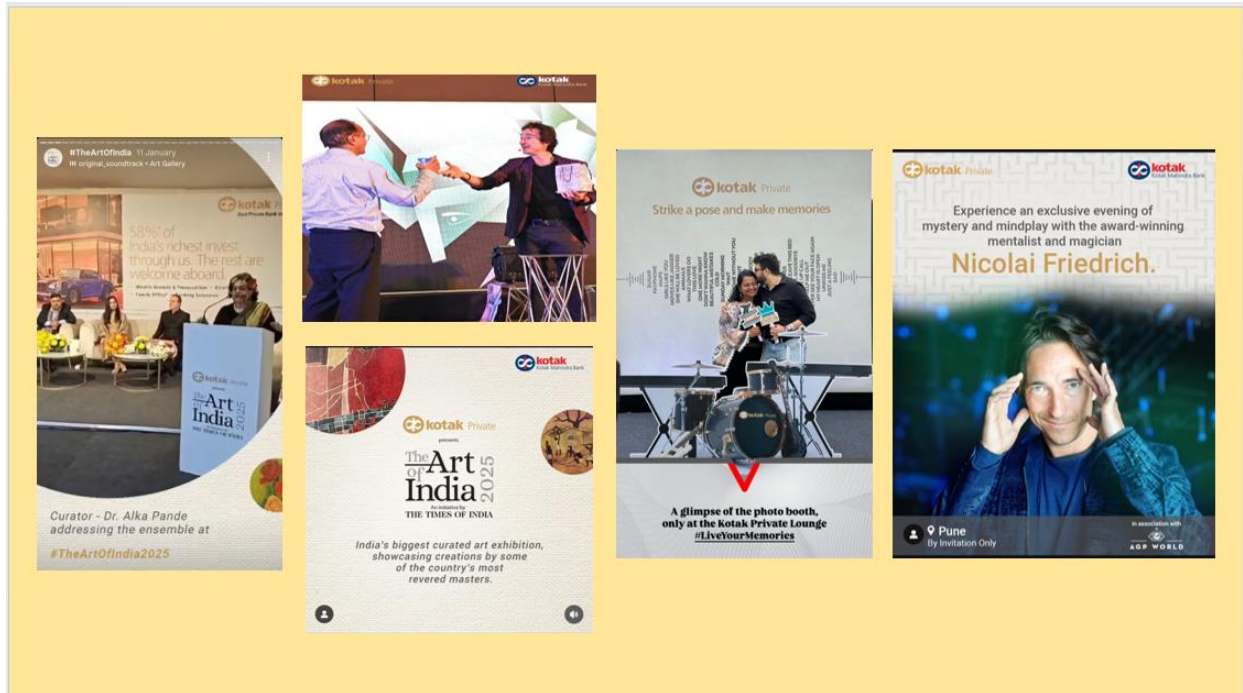
We collaborated with one of India's Top media houses for the "Art of India 2025", a distinguished showcase of masterpieces by India's most revered artists. This exclusive exhibition celebrated the brilliance of the nation's artistic heritage, featuring iconic works alongside extraordinary creations from India's finest indigenous talents. As a prelude, Kotak Private Clients enjoyed an exclusive preview, offering an intimate encounter with these exceptional artworks before the public unveiling. Elevating this experience further, our bespoke masterclass provided unparalleled insights into art as an asset, enriching our clients' appreciation of its cultural and financial significance.

Below are a few snapshots from some of our events:



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The remarkable impact our marketing efforts have delivered are listed below:

Increase in AUM and leads:

- Significant 25% inc in AUM increase (*Mar'24 vs Dec'24*)
- 128% increase in leads (*FY 23-24 vs FY 24-25*)

Website Traffic:

- 60% increase in total traffic (*Apr'24 vs Mar'25*)
- 91% in website New users (*Apr'24 vs Mar'25*)

Group Product Coverage Score

- GPC indicates Group Product Coverage. It means activating the product for any member of the family. GPC: score up from 3.96 vs 4 (*Mar'24 vs Feb'25*)

Client Coverage & Engagement:

- Over 2600 clients engaged as part of our marketing efforts
 - Client Coverage: 1800+ clients in Delhi, Mumbai and Bangalore
 - 800+ **new clients** in Kolkata, Ahmedabad, Nagpur, Hyderabad, Indore & Pune

NR Programme:

- 110 Families on boarded in NR programme

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PR Coverages

- 363 Pan India coverages across print, online and digital (including regional markets) in FY 24-25

Social media

- 77% increase in followers on Instagram (Apr'24 vs Mar'25)
- 44% increase in followers on LinkedIn (Apr'24 vs Mar'25)

Some snippets of the feedback received from our clients at previous event is listed below:

"Thank you Jinal. Had a wonderful time this evening... enjoyed the food and the whole experience"

"Good Morning Priyhit, It was a wonderful dinner. Liked the way it was organized. Love the spread. We enjoyed the pasta and cod. Thanks for the invite "

"We had a very pleasant and nice experience last evening. Thank you for inviting us"

"Thank you so much for having us at the event. It was a truly enriching session, and im so glad I could be a part of it. I walked away with a deeper understanding of investments and the market. Also was inspiring meeting such incredible women with diverse and successful careers. It really opened up my mind and gave me a fresh perspective. Grateful for the experience and the warmth with which it was all put together"

"Well spent 2 days. Very informative, inspirational, enriching experience, a complete guide, answering many doubts. Lots of effort put in. Flawless in 1 word. Thank you! Very well organized event Kotak team. I learned a lot. Thank you."

"Excellent even Nandita, clients gave extremely good feedback for event. Looks like one of two had adrenal rush after meeting Jensen. Jensen was kid enough to pose for selfie with clients"

"Hi Priyhit, Yes! We did enjoy the dinner and everything was good. Right from the ambiance to the quantity served was perfect! Thankyou."

Our curated engagements and events across 10 cities have significantly elevated brand visibility and deepened client relationships. By hosting over 2,600 clients, we delivered bespoke experiences that resonated across all pillars of engagement—knowledge, art, music, sports, wellness, entertainment, culinary, and emotional connection. Each event was thoughtfully designed to reflect our brand’s ethos, creating memorable moments that fostered trust and loyalty. The diversity of formats—from insightful talks and wellness retreats to gourmet evenings and cultural showcases—ensured relevance and impact across varied client interests. The overwhelmingly positive feedback highlighted our ability to personalize experiences while maintaining a consistent brand narrative. These engagements not only reinforced our positioning as a lifestyle-driven financial partner but also created lasting emotional bonds with our clientele, translating into stronger advocacy and deeper business relationships.

This approach is a proven strategy for fostering long-term loyalty. By offering “money-can’t-buy” experiences, Kotak Private creates emotional and intellectual value that transcends transactional banking. These events serve as touchpoints that reinforce trust, demonstrate expertise, and position us as a true partner in the client’s journey—not just financially, but holistically.

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The underlying philosophy of Kotak Private is to empower clients to “Live their purpose.” For many HNIs and UHNIs, wealth is not merely a measure of success but a tool to fulfill personal ambitions, support causes they care about, and create lasting legacies. Our experiential initiatives help clients thrive by giving them the confidence to leave their financial matters in expert hands, freeing them to focus on what truly matters to them—whether it’s philanthropy, entrepreneurship, family, or personal growth.

Moreover, these events foster a community of like-minded individuals, enabling clients to network, collaborate, and share ideas. This sense of belonging and shared purpose enhances the emotional connection with the brand, making Kotak Private not just a bank, but a lifestyle enabler and thought partner.

In today’s competitive financial landscape, where products and services are increasingly commoditized, Kotak Private’s focus on experiential marketing sets it apart. It reflects a deep understanding of its clientele’s evolving needs and aspirations. By investing in meaningful experiences, the bank not only strengthens its brand equity but also builds enduring relationships that are based on trust, relevance, and shared values.