

THE BLUEPRINT

GRADUATION PROJECT

BRANDING FOR 'PD WEALTH'

MENTOR – AMITANSHU SHRIVASTAV

SPONSOR – VISHNU AGARWAL

INSTITUTE – SACREDFIG DESIGN

2025

NATASHA KAUSHAL

INTERDISCIPLINARY DESIGN

2021 BATCH



JK LAKSHMIPAT UNIVERSITY
Institute of Design
NAAC 'A' Grade Accredited

Creating an Inclusive Learning Environment: Designing an Accessible Educational Facility for Diverse Students

VOL. 1 of 2

Student : **Natasha Kaushal**

Sponsor : **SacredFig Design**

Mentor : **Amitanshu Shrivastav**

Consultant : **Vishnu Agarwal**

Programme :

Bachelor of Design (B.Des)
Interdisciplinary Design

The Evaluation Jury has recommended **Natasha Kaushal**
for graduation from **Institute of Design, JK LAKSHMIPAT UNIVERSITY**
with specialization in **Interdisciplinary Design**

Herewith, for the project titled "**Branding for PD Wealth**"
on fulfillment of requirements by

Jury Chairman

Jury Member

Jury Member

Subsequent remarks regarding fulfillment of requirements

Dean, Institute of Design
JK Lakshmipat University

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Student Name in Full: Natasha Kaushal

Signature: Natasha Kaushal

Date: 18-06-2025

Place Jaipur

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Student Name in Full: Natasha Kaushal

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1. Project Overview

1.1 Introduction

PD Wealth is a mutual fund brand built to make finance feel more human, clear, and trustworthy — especially for first-time investors. This project develops the brand from scratch, focusing on a visual identity and tone that reflect long-term value, simplicity, and emotional connection.

The goal was to design more than just a logo — to craft a complete system grounded in strategy, voice, and experience. This includes the creation of Crème & Cellar, a marketing event that brings the brand to life through taste, dialogue, and design.

This document captures the full journey — from insight-led research to visual systems and brand experience — showing how thoughtful design can reshape the way we connect with financial services.

1.2 Project objective

This branding project aims to establish a distinctive and future-ready identity for PD Wealth, a mutual fund company focused on building trust with first-time investors.

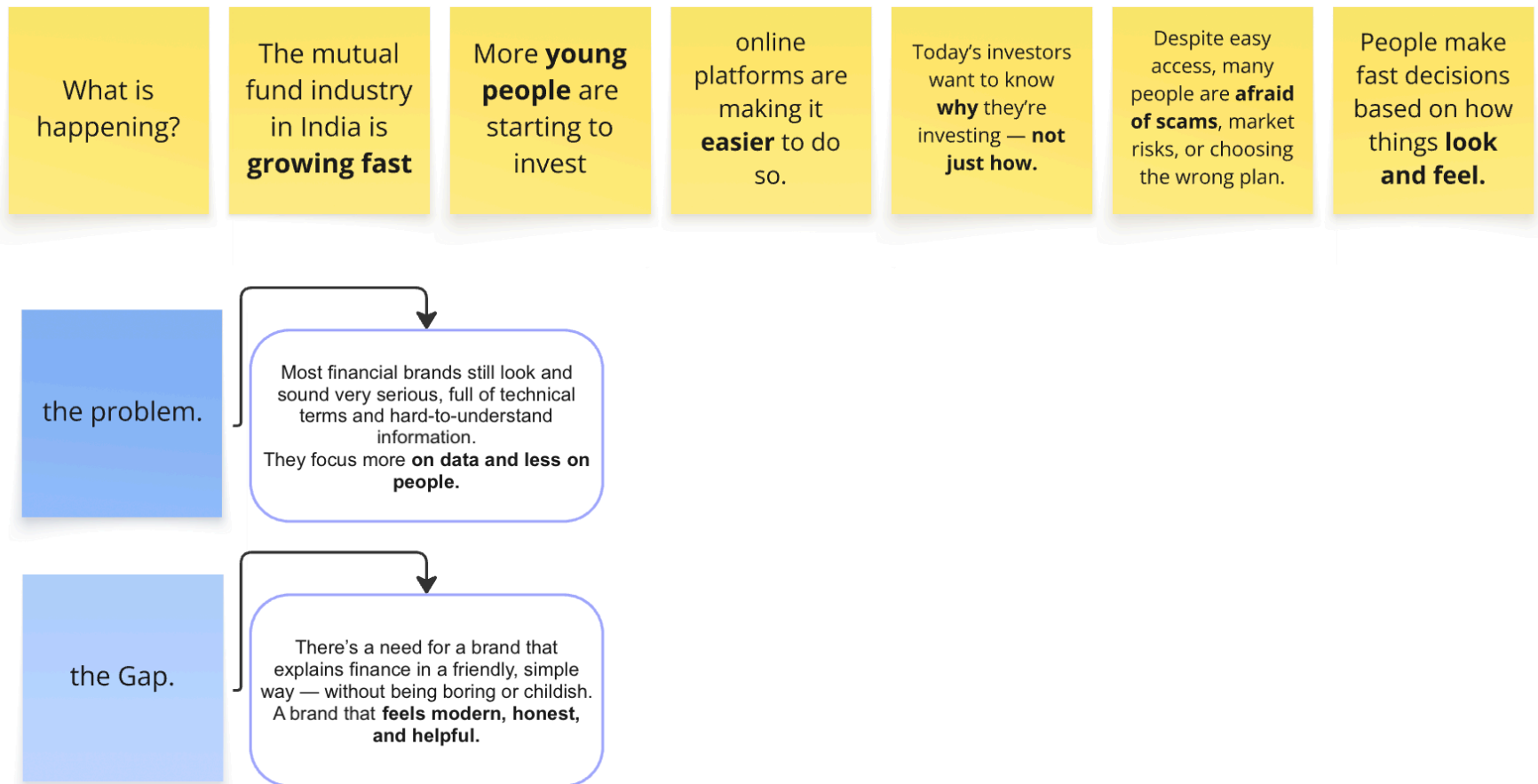
The core objective is to simplify how people perceive finance — shifting the narrative from intimidating and transactional to approachable and human. The brand identity system is designed to reflect PD Wealth's core values: clarity, consistency, trust, and long-term growth.

The project goes beyond logo development to include a strategic foundation, a cohesive visual and verbal language, and an experiential extension through the marketing event Crème & Cellar. Together, these elements position PD Wealth as a finance brand that not only manages wealth, but also nurtures lasting relationships.

1.3 Scope of work

1. Brand strategy

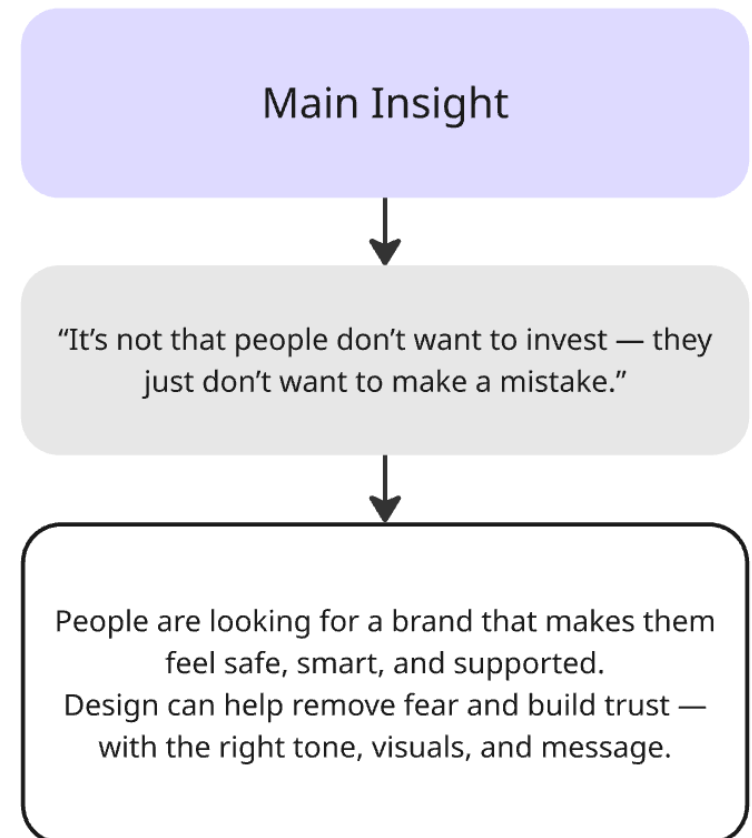
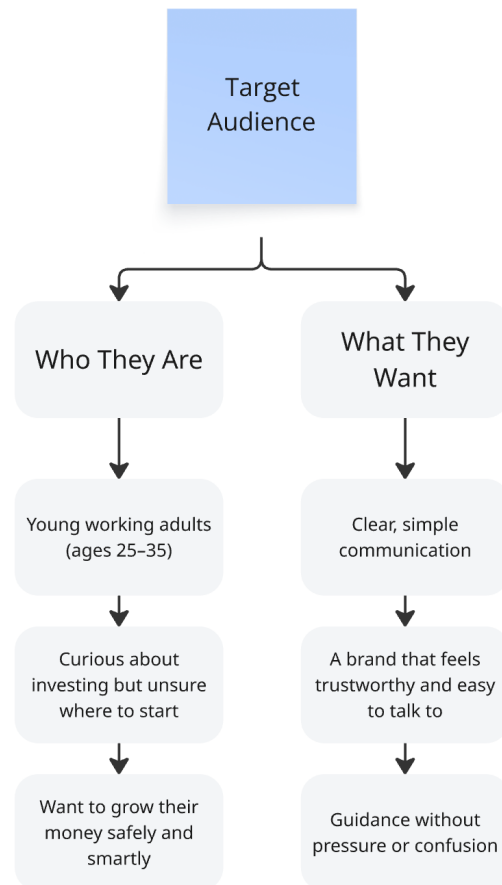
- Industry & audience research



1.3 Scope of work

1. Brand strategy

- Industry & audience research



1.3 Scope of work

1. Brand strategy

- Competitor mapping



Key Observations:

- Old players (like HDFC Mutual Fund, ICICI Prudential) use traditional visuals — dark colors, formal fonts, and complex language.
- New platforms (like Zerodha, Groww, INDmoney) are more digital, minimal, and user-friendly — but still focus more on function than feeling.

1.3 Scope of work

1. Brand strategy

- Brand positioning

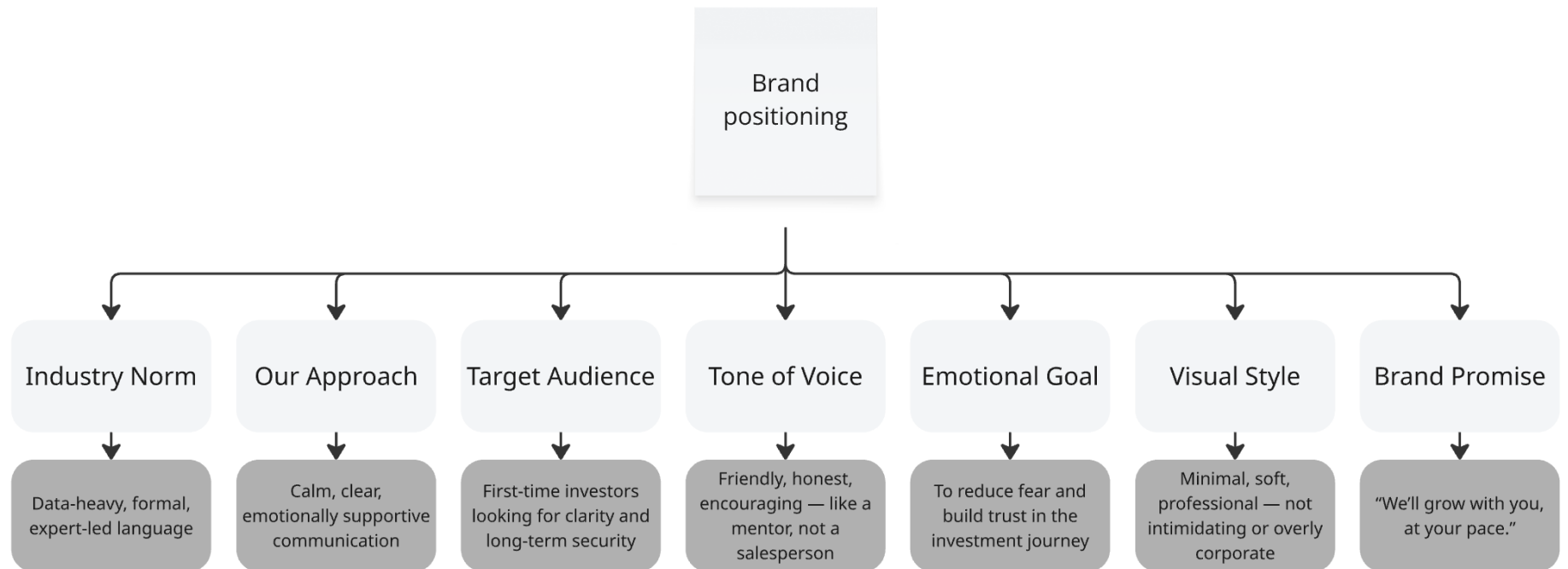
The brand is positioned to feel:

- Reliable, but not rigid
- Approachable, but not casual
- Modern, but rooted in long-term thinking

1.3 Scope of work

1. Brand strategy

- Brand positioning



1.4 Problem statement

The problem isn't money — it's how it's presented. PD Wealth must be such a brand where investing is something where people can feel comfortable starting.

2. Research

2.1 Target audience personas

Riya
Age - 27
UI/UX designer



Platform Use: PhonePe

Personality: Cautious, design-aware, seeks clarity before taking action

Pain Points (from existing brands):

- Overwhelmed by options and technical terms
- Doesn't know who to trust
- Scared of making the wrong investment move

Needs (from a brand):

- A brand that talks simply
- A design that feels clean, modern, and non-intimidating
- Trust through honest visuals and tone — not pressure or urgency

Arjun
Age - 24
Junior Consultant



Platform Use: PhonePe , Googlepay

Personality: Ambitious, logical, but easily distracted by trends

Pain Points (from existing brands):

- Gets confused between short-term hype and long-term value
- Thinks mutual funds are "complicated" or "for older people"

Needs (from a brand):

- A brand that's confident but not preachy
- Visuals that look professional but not too stiff
- A mix of emotional security and practical advice

2.2 Key insights and opportunities

Insights

- Finance feels intimidating
- Trust is shaped by design
- Jargon creates distance
- Brands feel too robotic
- Young users want connection

Opportunities

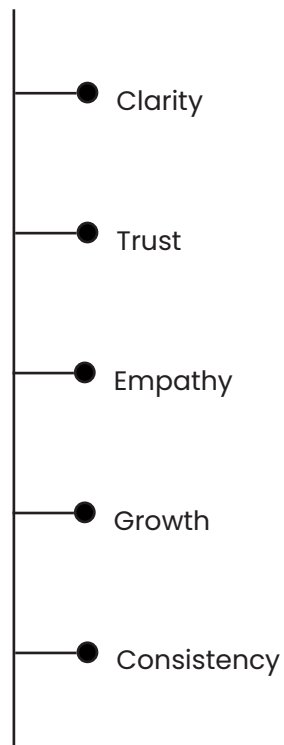
- Use soft, modern visuals and a calm tone to reduce anxiety
- Create a minimal yet warm visual identity with balanced typography, friendly colors, and open space
- Build a brand voice that's clear, helpful, and down-to-earth — like talking to a real person
- Develop a personality for PD Wealth that is human, kind, and patient — without sounding childish
- Use storytelling, relatable scenarios, and inclusive design to make users feel emotionally supported

3.Brand strategy

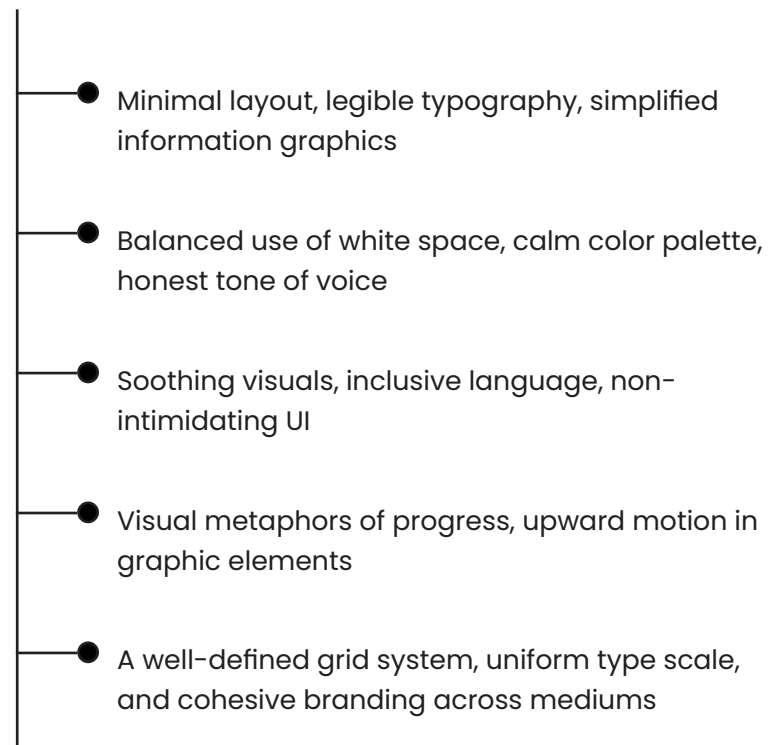
3.1 Brand values

These are the principles that shape every visual and verbal decision made for PD Wealth's brand identity.

Values



How it reflects in design

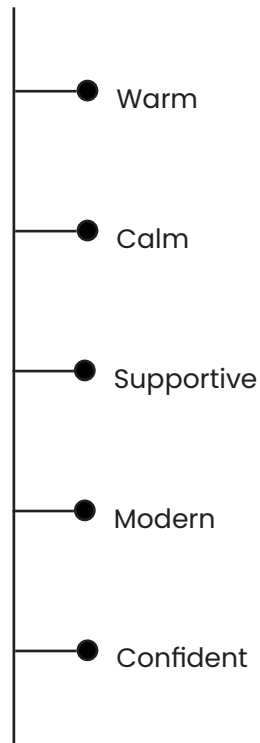


3.Brand strategy

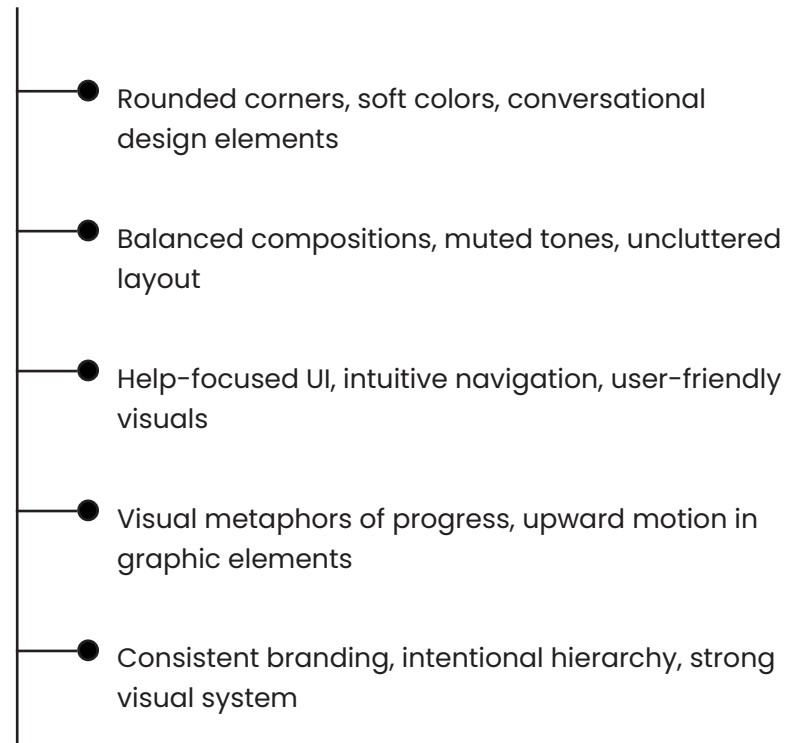
3.2 Brand personality

The brand personality defines how PD Wealth behaves and interacts visually and verbally. It gives the brand a relatable human character.

Traits



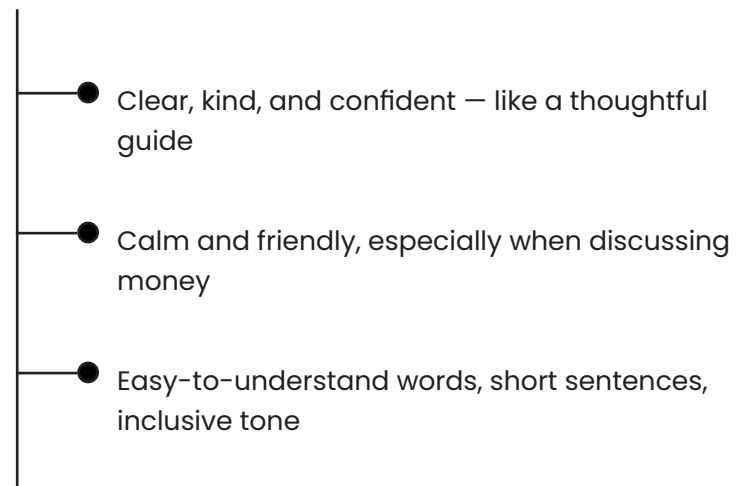
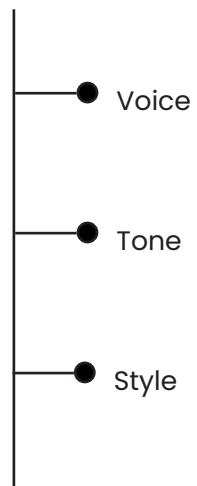
How it reflects in design



3.Brand strategy

3.3 Brand voice and tone

This defines how PD Wealth speaks — both in writing and in feeling.



3.Brand strategy

3.4 Brand story

PD Wealth was born out of a simple observation:

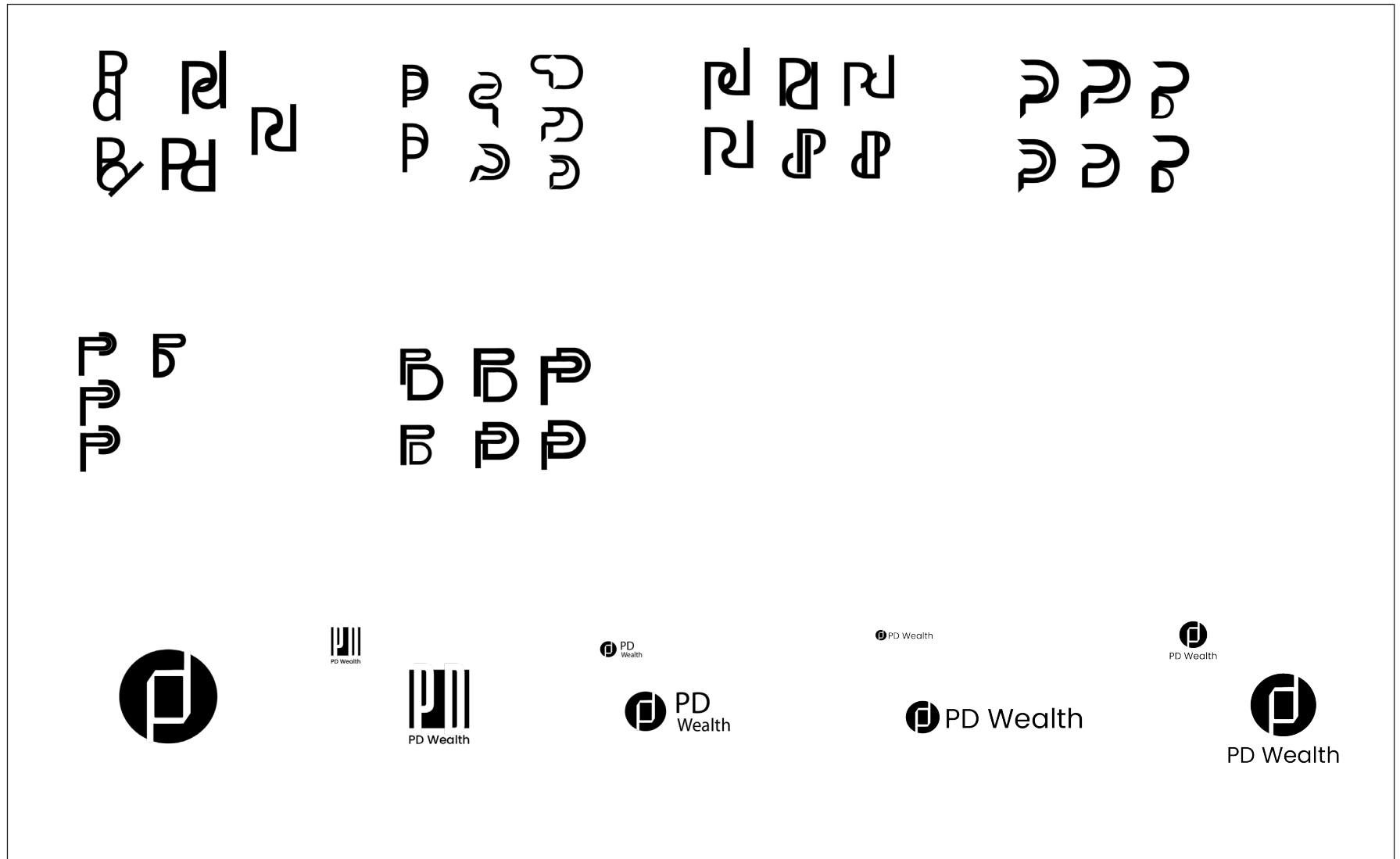
Finance brands talk about money. But people want someone who talks to them.

As a branding concept, PD Wealth represents:

- Reassurance instead of risk
- Conversation instead of complexity
- A calm, design-driven guide into the world of investing

4. Visual identity system

4.1 Logo Iterations - (set-1)



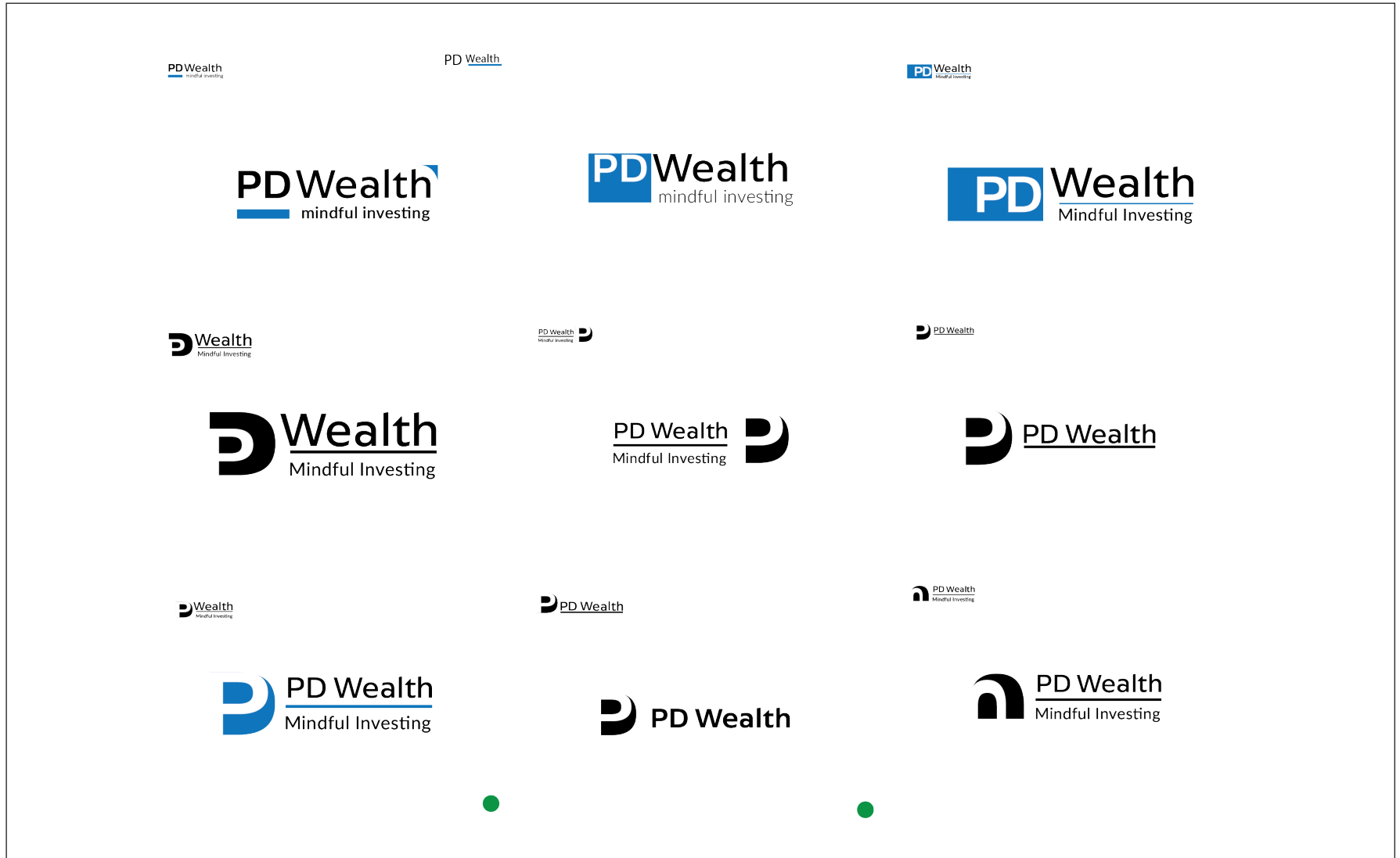
4. Visual identity system

4.1 Logo Iterations – (set-2)



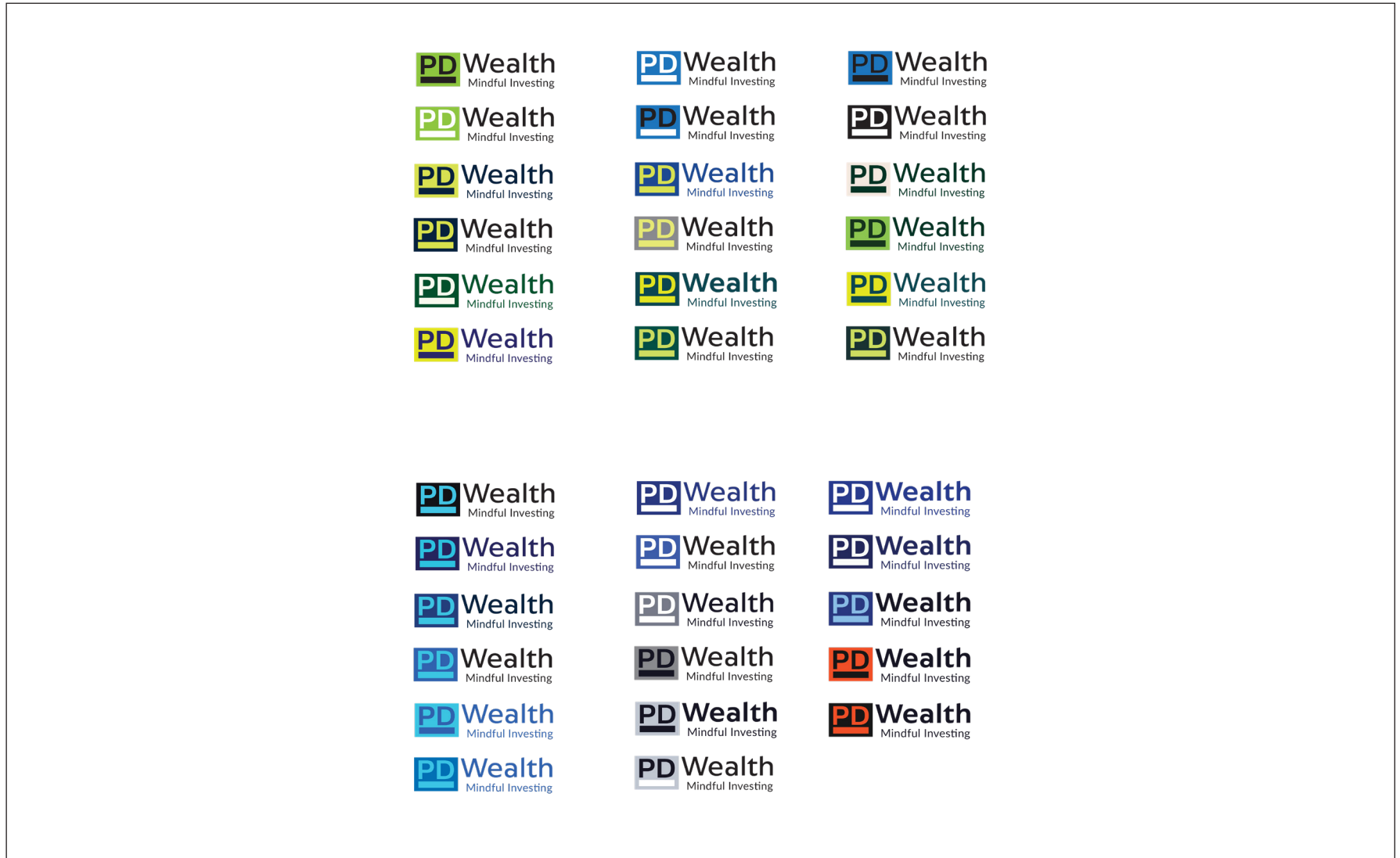
4. Visual identity system

4.1 Logo Iterations - (set-3)



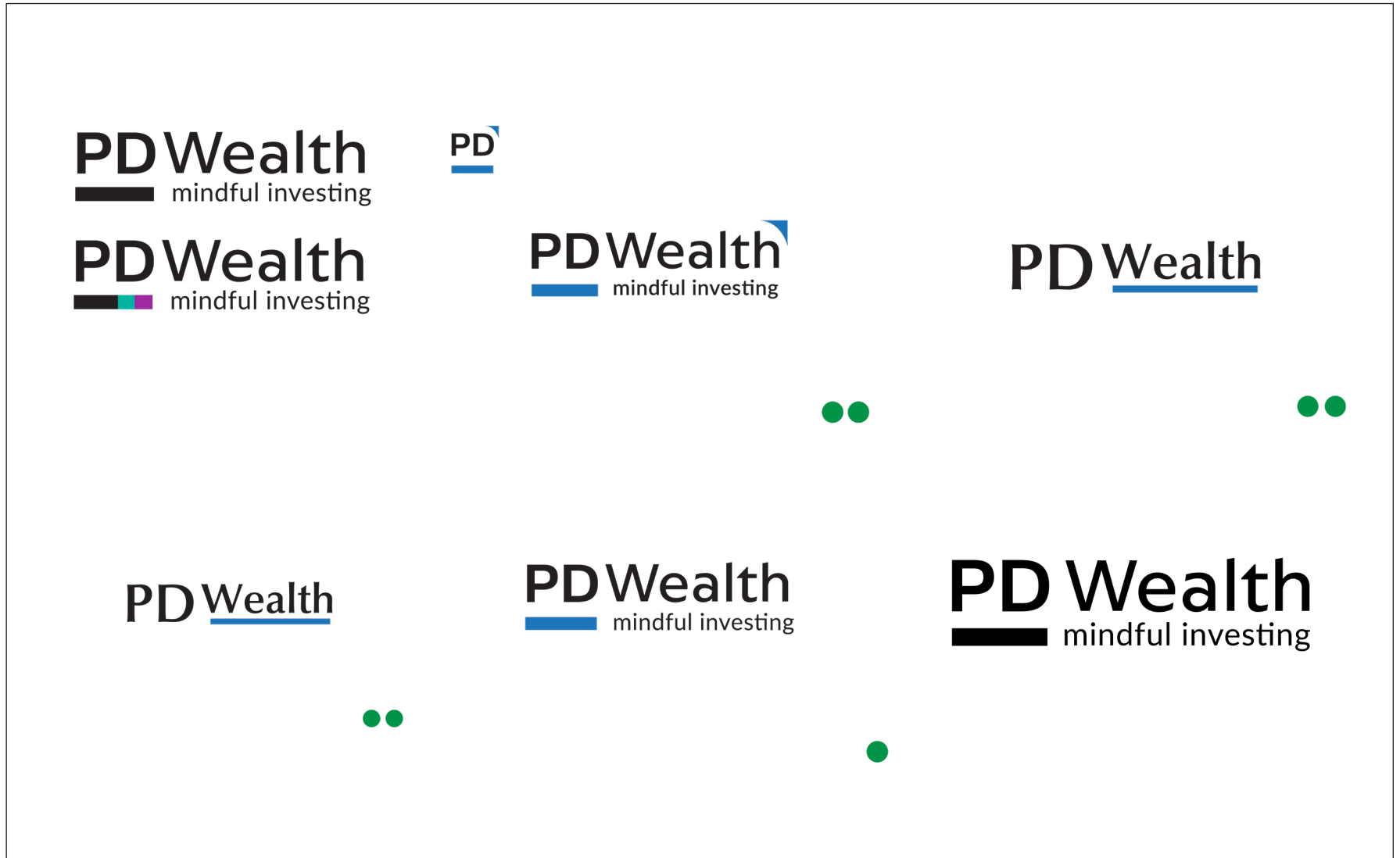
4. Visual identity system

4.1 Logo Iterations – Color scheme



4. Visual identity system

4.1 Logo Iterations - (set-4)



4. Visual identity system

4.2 Logo concept

The logo for PD Wealth is designed to feel calm, structured, and reliable — just like the experience it promises investors. Inspired by the idea of growth with stability, the symbol combines upward motion with balance.

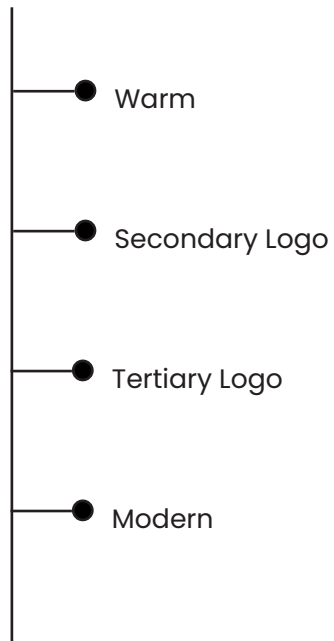


4. Brand identity system

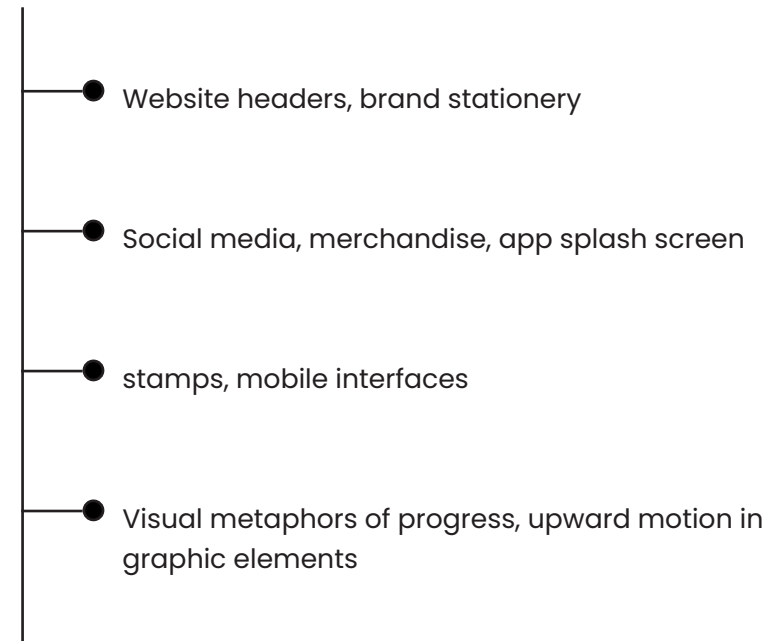
4.3 Logo variations

To ensure flexibility and legibility across different media, multiple logo variations were developed:

Variations



Usage Context



4. Brand identity system

4.3 Logo variations

Primary logo – Logo description



The PD Wealth primary logo is a refined and modern mark that represents

- legacy, financial clarity, and growth. This version introduces a new visual element
- an upward-pointing arrow
- further reinforcing the brand's commitment to progress and mindful investment.

4. Brand identity system

4.3 Logo variations

Secondary logos – Logo description

The secondary logo system for PD Wealth offers flexible adaptations of the primary identity for use across social media platforms, digital assets, and branded collateral.



- Social media avatars and posts
- Marketing materials and brochures
- Emailers and digital banners
- Print and merchandise applications

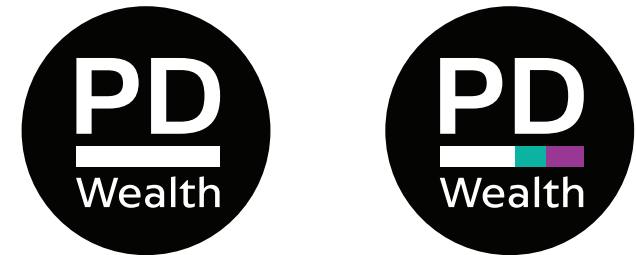
4. Brand identity system

4.3 Logo variations

Tertiary logos – Logo description

The tertiary logo set for PD Wealth is a compact and minimal expression of the brand identity.

These logos are specifically designed for use in small digital spaces, where full primary or secondary logos may lose clarity or impact.



- Social media profile icons
- Mobile app icons
- Stamps, stickers, or merchandise where space is limited
- Watermarks and footers

4. Visual identity system

4.4 Logo clearance and grid

A defined grid system was used to construct the logo, ensuring perfect alignment and proportion.

The clear space around the logo is determined using the height of the capital letter “P” from the logotype as a measuring unit (denoted as X).

- Maintain X (height of “P”) on all four sides of the logo.
- No text, image, or design element should enter this zone.



4. Visual identity system

4.5 Logo Misuse

The PD Wealth logo is a key asset of the brand and must be used consistently to maintain its integrity and recognizability. Any alteration, distortion, or misapplication diminishes the brand's impact and can lead to confusion or a lack of professionalism.

4. Visual identity system

4.5 Logo Misuse

Do Not Stretch or Distort

Never stretch, compress, skew, or warp the logo in any direction. Always maintain its original proportions.



Do Not Change the Logo Colors

The logo must only appear in the approved brand colors. Avoid applying gradients, textures, or unapproved hues.



Do Not Rotate the Logo

Keep the logo upright. Rotating it at any angle reduces legibility and violates brand standards.



4. Visual identity system

4.5 Logo Misuse

Do Not Rearrange Elements

The structure of the logo must remain fixed. No elements can be moved.

Do Not Alter the Typography

Do not replace or modify the typeface, spacing, or arrangement of the text elements in the logo.

Do Not Crop the Logo

Ensure the logo is always shown in full. Cropping any part of it undermines the brand's consistency.



4. Visual identity system

4.6 Color palette

The PD Wealth color palette has been carefully curated to reflect the brand's distinct personality—vibrant yet trustworthy, bold yet grounded. Each color plays a specific role in evoking emotions and maintaining consistency across all visual communication.

Colors	Usage	Hex Code	Emotional role
● Confident Purple	● Primary brand color	● #9A3794 	● Power, creativity, leadership
● Assured Teal	● Supportive	● #00B2A0 	● Clarity, trust, balance
● Deep Black	● Base tone / Text	● #231F20 	● Authority, focus, structure
● Clean White	● Background & Space	● #FFFFFF 	● Simplicity, openness
● Bold Orange	● Accent / CTA	● #F15B22 	● Energy, urgency, action

4. Visual identity system

4.7 Typography system

Typography plays a key role in defining the personality and tone of the PD Wealth logo. The chosen typefaces balance modernity with trust, reflecting the brand's commitment to clarity, reliability, and mindful investing.

4. Visual identity system

4.7 Typography system



- Font: ApronSans Medium
- Style: Bold, geometric sans-serif
- Purpose: “PD” is highlighted in a slightly heavier weight to signify strength and legacy. The name pays homage to the founder’s father, making it the emotional core of the brand.

4. Visual identity system

4.7 Typography system



- Font: ApronSans Regular
- Style: Clean, slightly lighter than "PD"
- Purpose: Paired with "PD," it communicates clarity, balance, and professionalism — ideal for a financial brand.

4. Visual identity system

4.7 Typography system

PD Wealth
— mindful investing

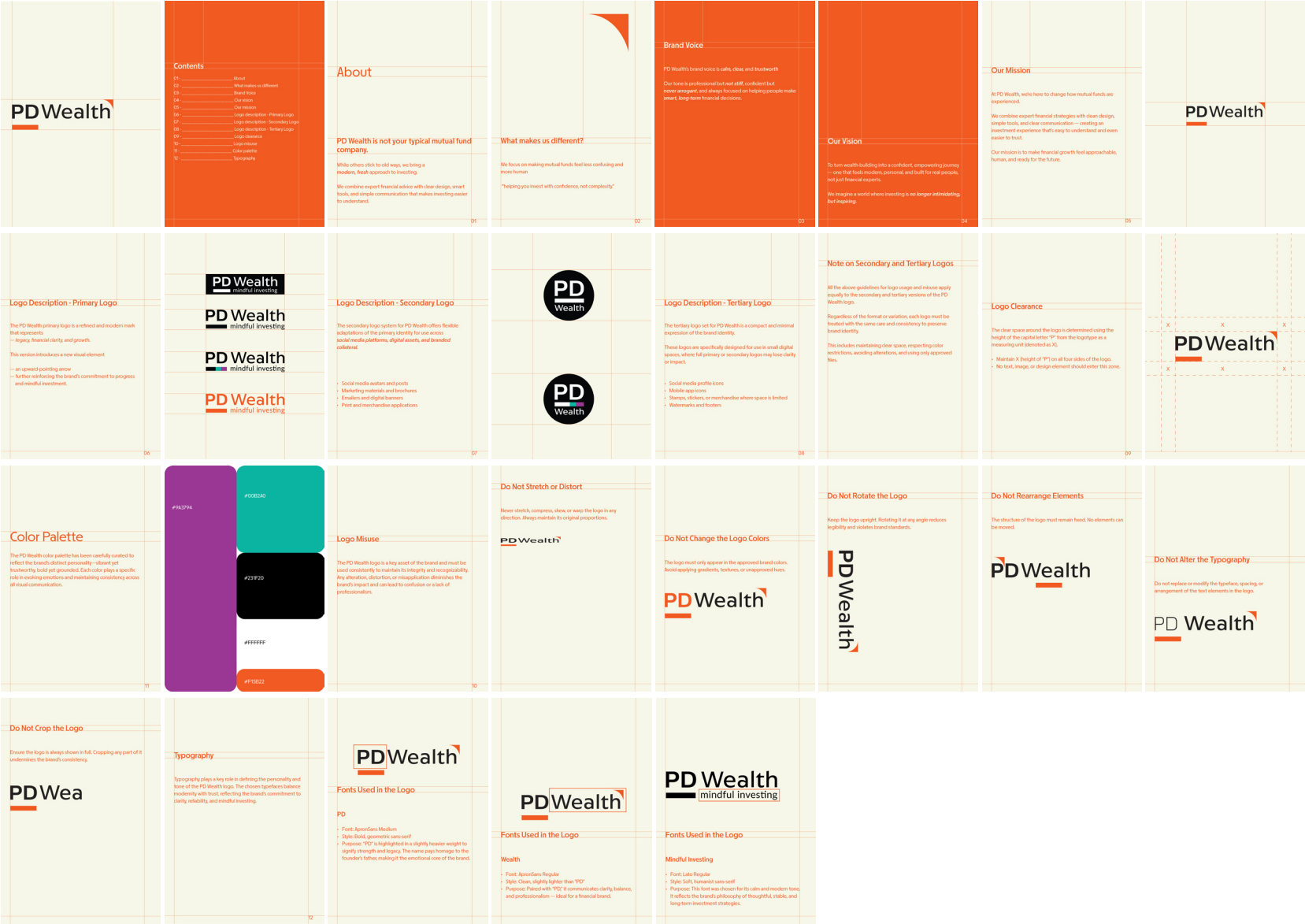
- Font: Lato Regular
- Style: Soft, humanist sans-serif
- Purpose: This font was chosen for its calm and modern tone. It reflects the brand's philosophy of thoughtful, stable, and long-term investment strategies.

5. Brand applications

5.1 Brand manual

The logo for PD Wealth is designed to feel calm, structured, and reliable — just like the experience it promises investors. Inspired by the idea of growth with stability, the symbol combines upward motion with balance.

5.1 Brand manual



5. Brand applications

5.2 Stationary design

Includes custom-designed visiting cards and envelopes using the primary brand colors, logo system, and typography. The goal was to create a professional and refined look that instills trust while remaining visually distinct.

5. Brand applications

5.2 Stationary design – visiting cards (set-1)



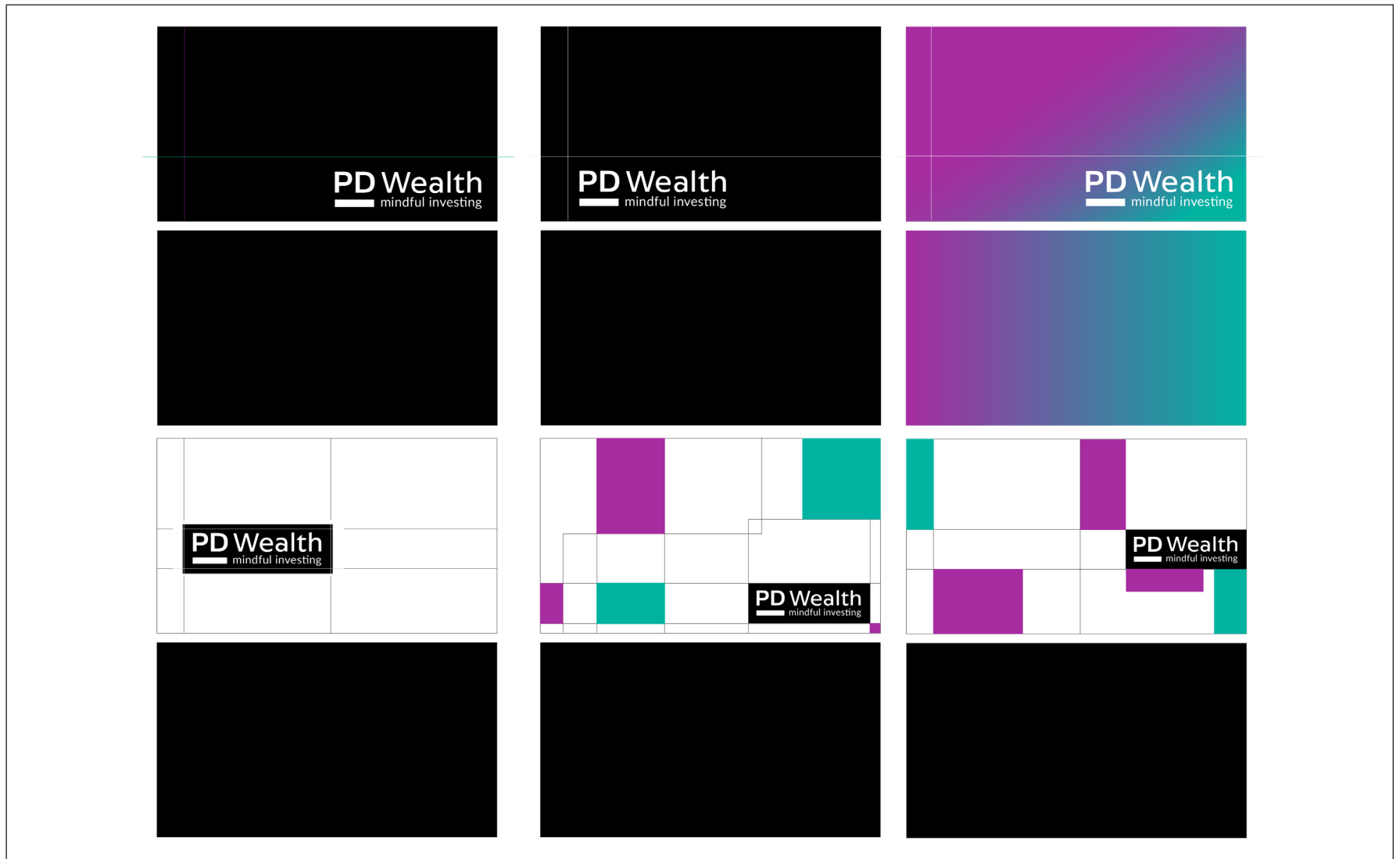
5. Brand applications

5.2 Stationary design – visiting cards (set-2)



5. Brand applications

5.2 Stationary design – visiting cards (set-3)



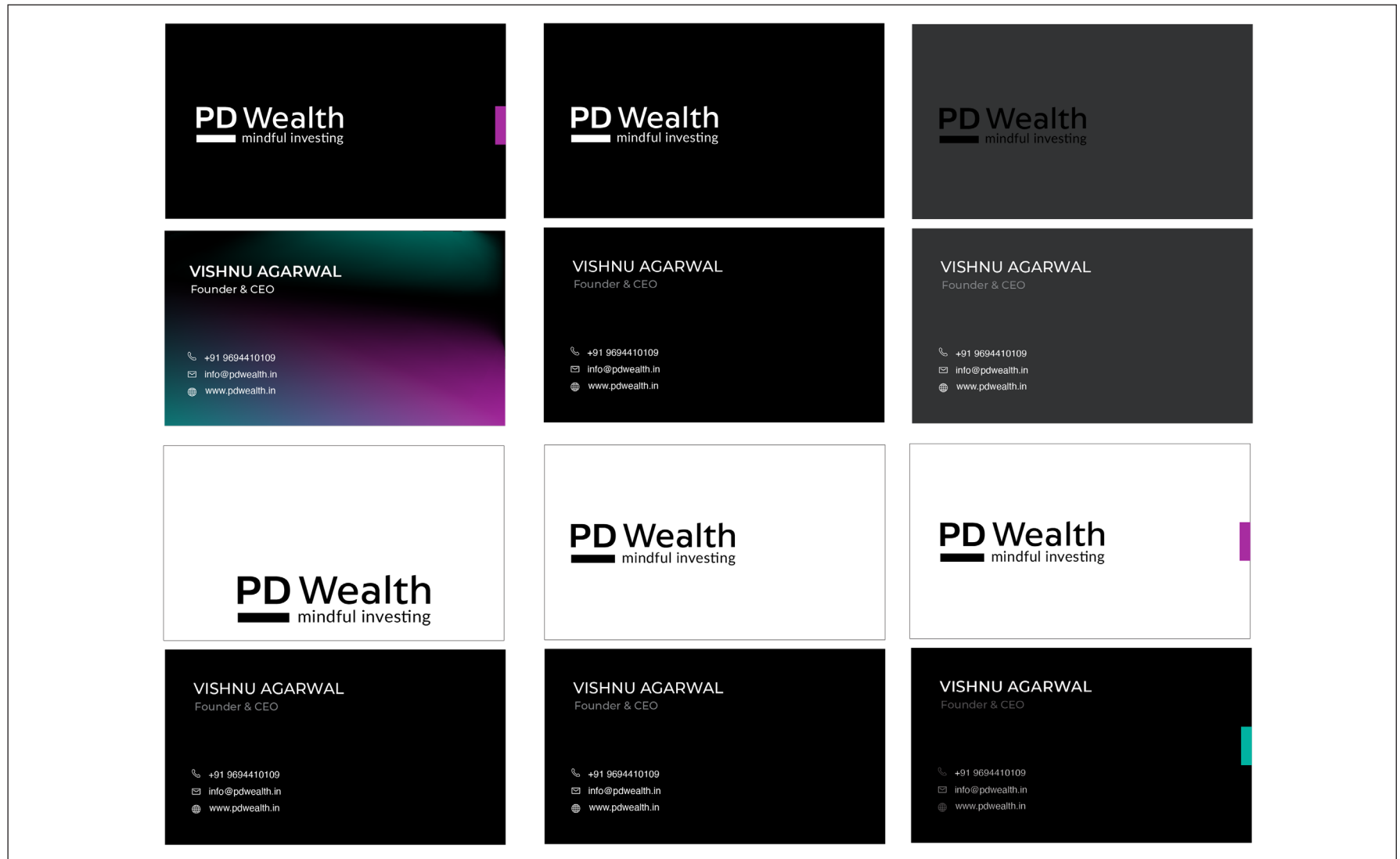
5. Brand applications

5.2 Stationary design – visiting cards (set-4)



5. Brand applications

5.2 Stationary design – visiting cards (set-5)



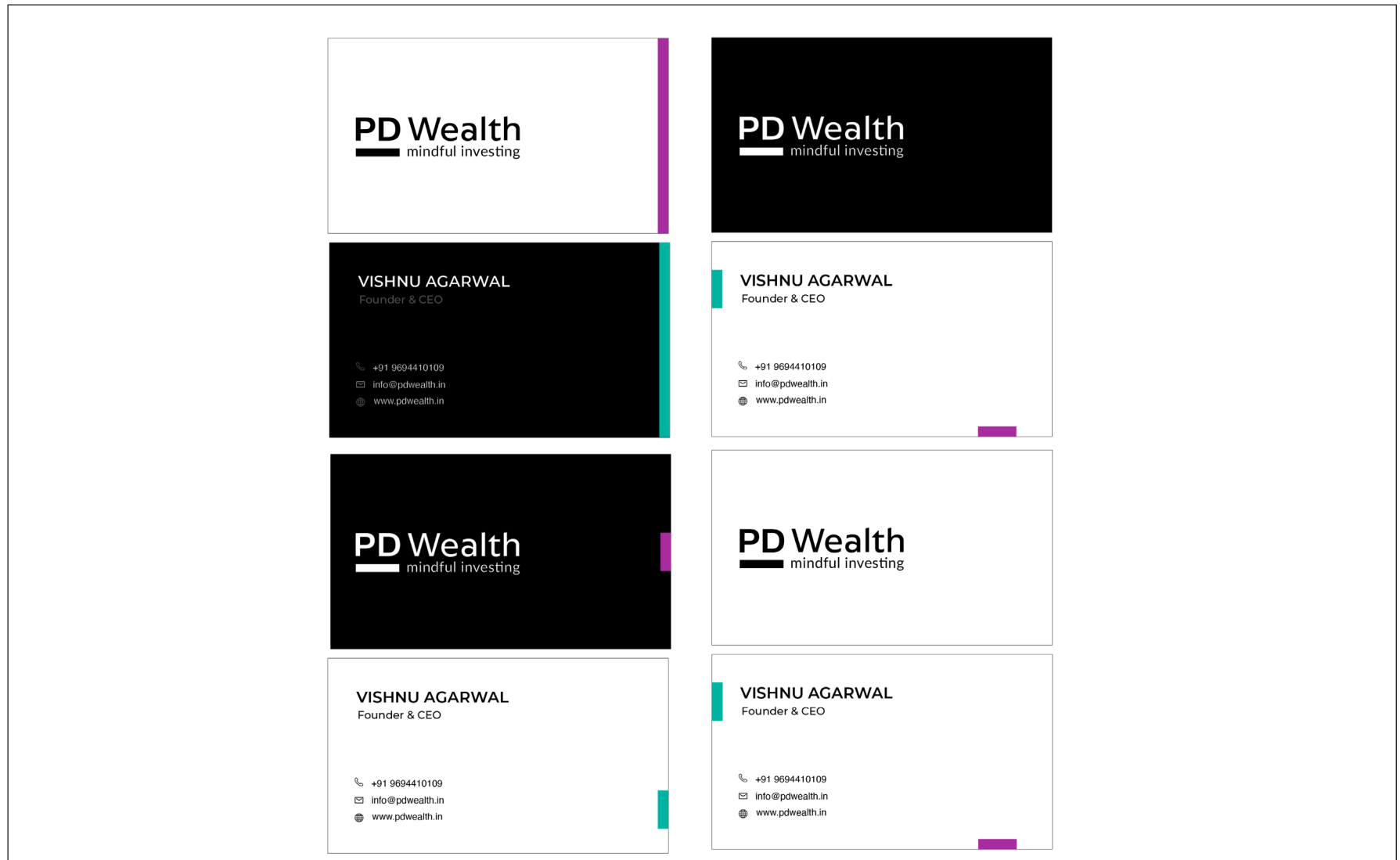
5. Brand applications

5.2 Stationary design – visiting cards (set-6)



5. Brand applications

5.2 Stationary design – visiting cards (set-7)



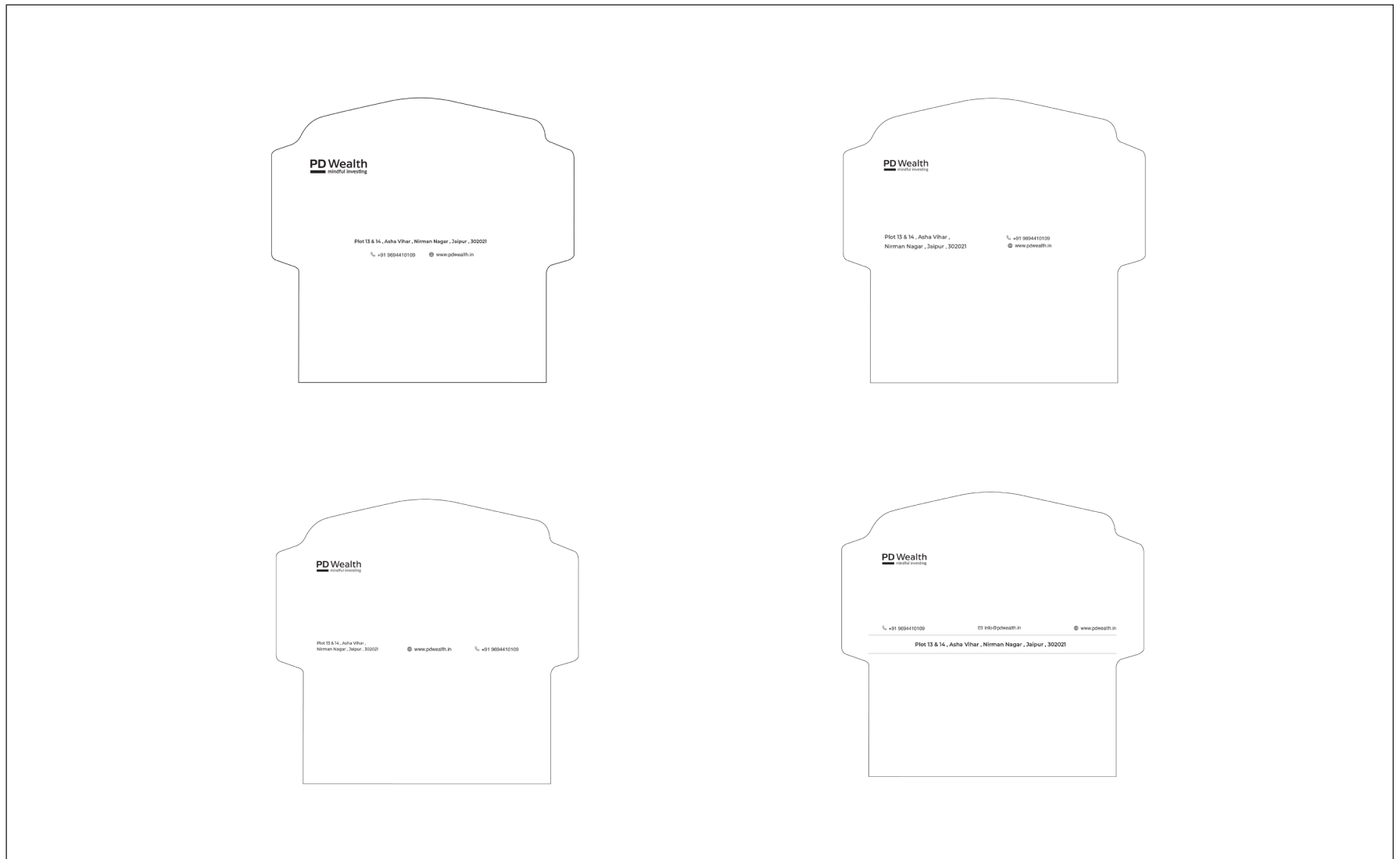
5. Brand applications

5.2 Stationary design – Envelope design (set-1)



5. Brand applications

5.2 Stationary design – Envelope design (set-2)



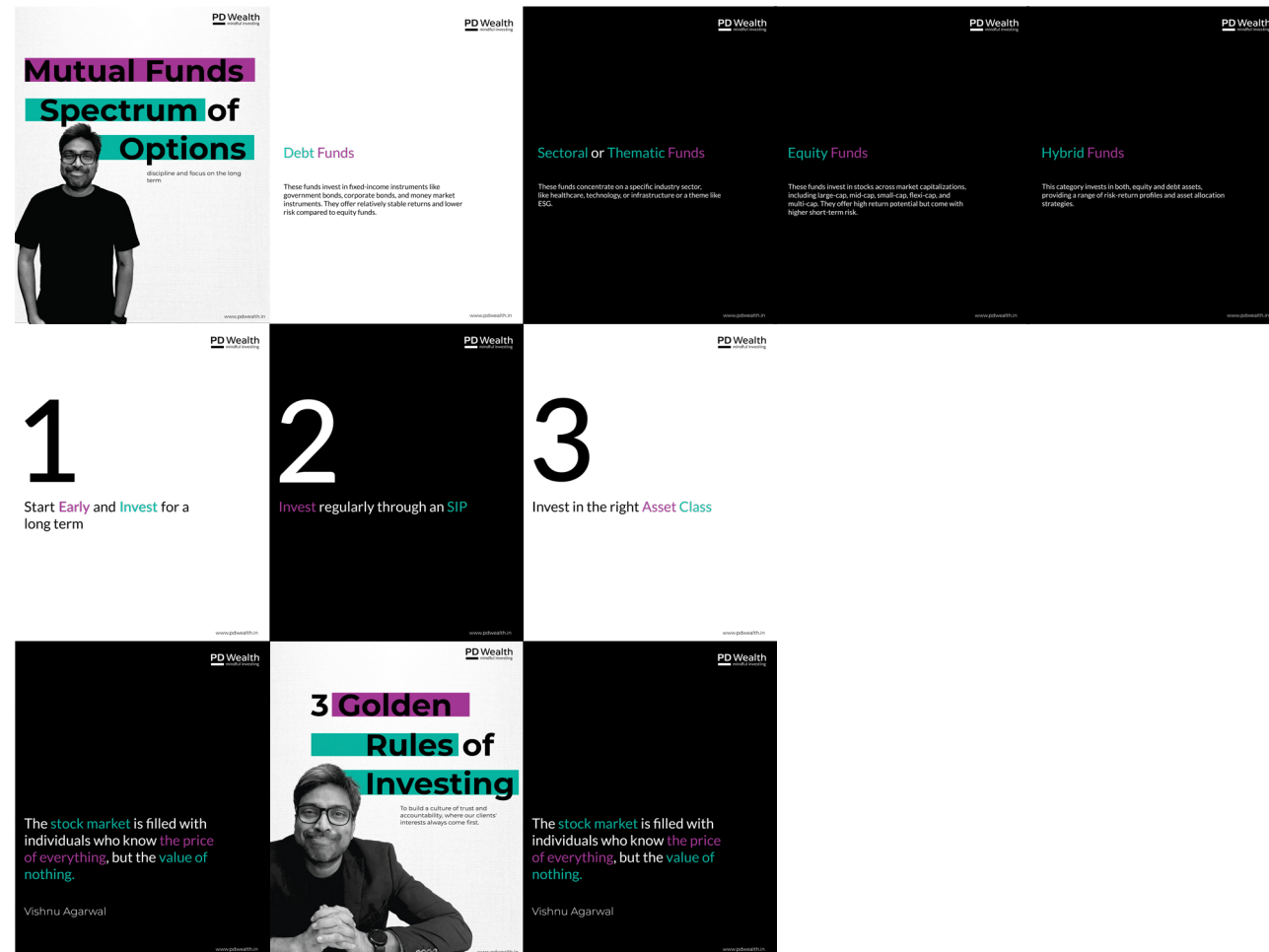
5. Brand applications

5.2 Stationary design – Brand personality cards



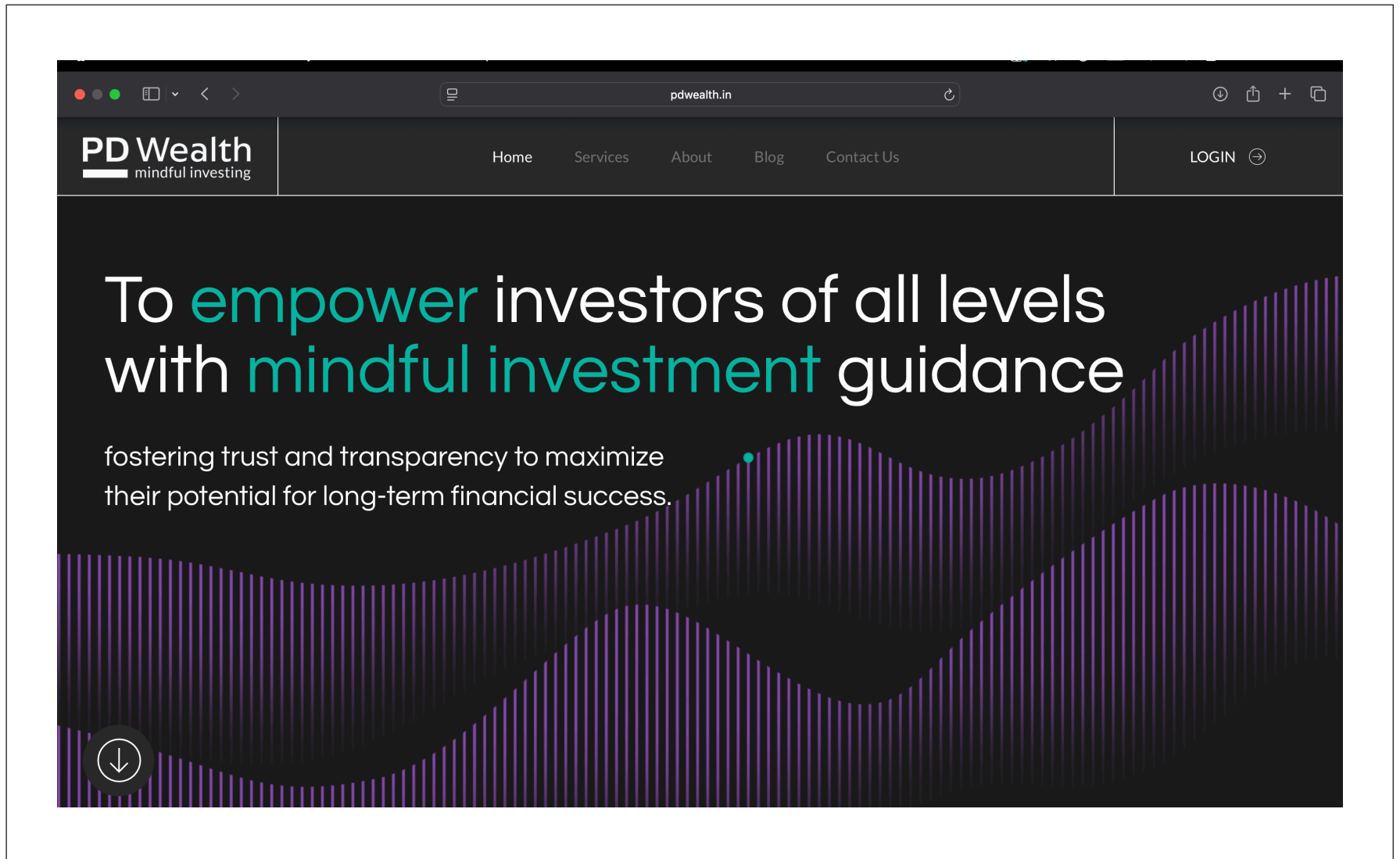
5. Brand applications

5.3 Social media template



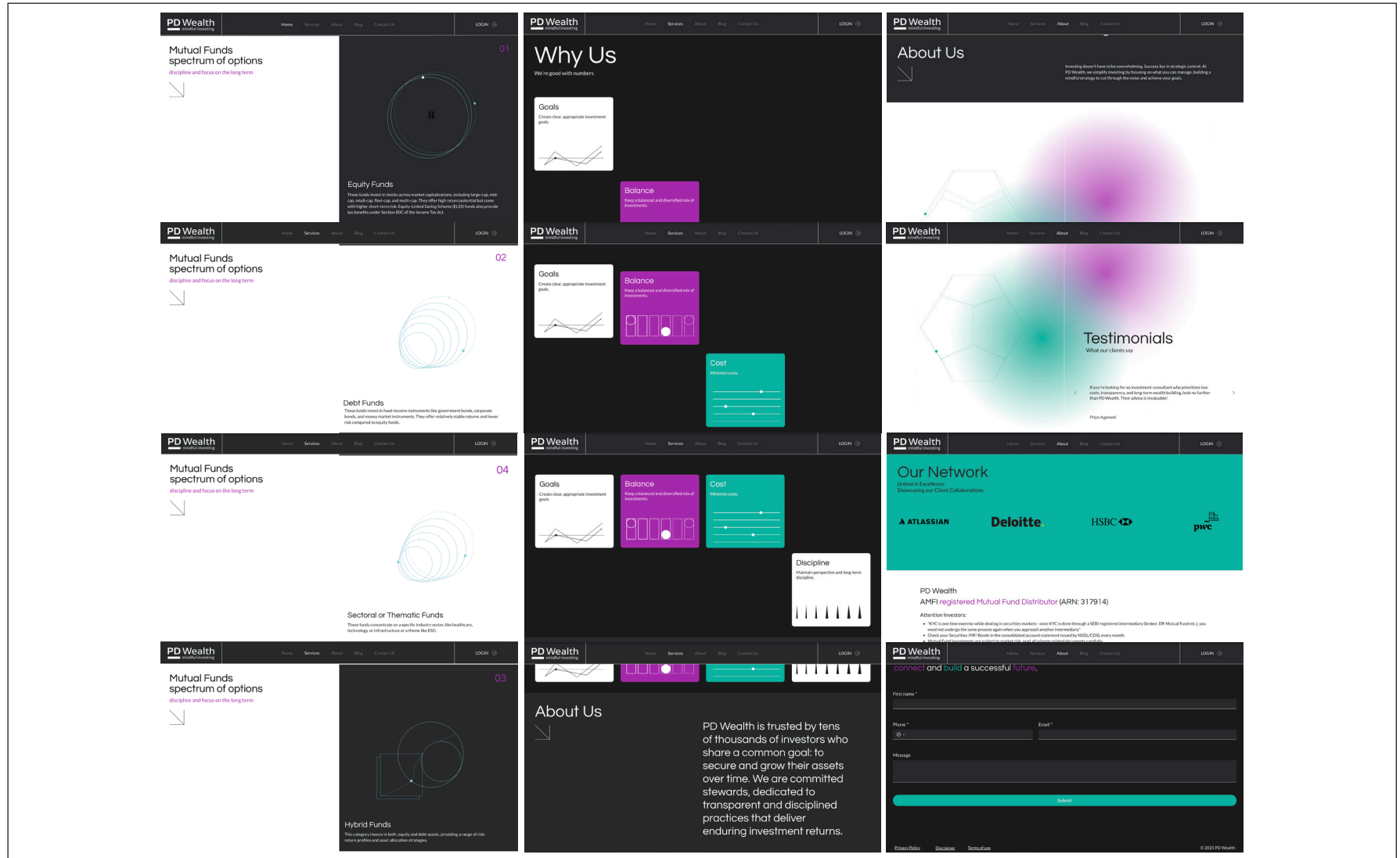
5. Brand applications

5.4 website



5. Brand applications

5.4 website



5. Brand applications

5.5 Presentation deck – Index iterations

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PD Wealth 02

5. Brand applications

5.5 Presentation deck

Financial Goals

Successful investing is to achieve one's financial goals

Worry free retirement

Desired education for your kids

Able to buy your dream house

Build a corpus for charity

Leave a legacy for your future generations

03

How Inflation is eating your money?

Average inflation has grown by 5.64% in last 30 years

Asset Class	Year	Value	Inflation
Gold	1990	₹1,200	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%
Fixed	1990	₹1,000	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%
Equity	1990	₹1,000	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%

04

How Inflation is eating your money?

Average inflation has grown by 5.64% in last 30 years

Asset Class	Year	Value	Inflation
Gold	1990	₹1,200	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%
Fixed	1990	₹1,000	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%
Equity	1990	₹1,000	-
	2004	₹6,245	-
	2024	₹12,252	+5.25%

05

Returns of Different Asset Class

Value of ₹1,000 invested in 1992

Asset Class

Asset Class	1992	2000	2011	2024
Gold	₹1,000	₹1,243	₹1,088	₹1,345
Fixed Deposit	₹1,000	₹1,243	₹1,088	₹1,345
Equity	₹1,000	₹1,243	₹1,088	₹1,345

06

Returns of Different Asset Class

Value of ₹1,000 invested in 1992

Asset Class

Asset Class	1992	2000	2011	2024
Gold	₹1,000	₹1,243	₹1,088	₹1,345
Fixed Deposit	₹1,000	₹1,243	₹1,088	₹1,345
Equity	₹1,000	₹1,243	₹1,088	₹1,345

07

Advances are Permanent & Declines are Temporary

Some Fixed Deposit

08

Fear, Greed and Hope

09

Avoid Self Destructive Behaviour

Individuals who control their emotions are 10% more likely to succeed in the investment process

10

Embrace Uncertainty

Some of the most beautiful chapters in our lives won't have a title until much later

Some of the most profitable investments in our lives won't have returns until much later

11

Uncertainty Works

Date	SENSEX	FPI	P/E	After 1 Yr	After 3 Yrs	After 5 Yrs
22 Apr 1992	4467	57.42	22.4%	14.92%	14.92%	14.92%
26 Apr 1993	2077	54.4%	25.2%	22.4%	22.4%	22.4%
15 Feb 2000	9914	25.54	16.1%	25.2%	25.2%	25.2%
05 Sep 2003	8005	16.1%	11.34	25.2%	25.2%	25.2%
8 Jan 2008	20872	26.51	108.28%	26.51%	26.51%	26.51%
9 Mar 2009	8165	40.10%	11.45	26.51%	26.51%	26.51%
01 Dec 2018	31465	39.38	11.45%	30.4%	30.4%	30.4%
01 Mar 2020	31161	37.52%	11.47	30.4%	30.4%	30.4%

12

Uncertainty Works

Wealth = Savings x (1+r)^n

13

3 Golden Rules of Investing

Start Early and Invest for a long term

Invest regularly through an SIP

Invest in the right Asset Class

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Long Term SIP vs. Lumpsum

Period	NAV	SIP Investment	Lumpsum Investment
1	₹10.00	₹1,000.00	₹10,000.00
2	₹9.00	₹1,111.11	₹11,111.11
3	₹8.00	₹1,250.00	₹12,500.00
4	₹7.10	₹1,408.45	₹14,084.50
Total Units Accumulated		407.92	400
Value of Investment (₹)		4,497.22 @ NAV ₹11	4,400 @ NAV ₹11
Avg Price/Lakh		₹9.37	₹10.00

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Start Early 1

SURAJ started	SURAJ started after 10 years
SIP Systematic Investment Plan in equity mutual funds	SIP Systematic Investment Plan in equity mutual funds
₹10,000 p.m. at the age of 25 years in view to continue till 60 years for retirement	₹25,000 p.m. at the age of 35 years in view to catch up Suraj and continue 60 years for retirement

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Start Early 2

At the age of 60 years SURAJ accumulated	At the age of 60 years Abhishek accumulated
₹6.43 cr	₹4.71 cr
His investment value grew by x15.31	His investment value grew by x6.28

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25 Years of Mutual Funds

Equity MF scheme summary

Lumpsum Investment	SIP Investment
Invested amount ₹1 Lakh	SIP amount ₹10,000 P.M.
Average value ₹39.88 Lakh	Average value ₹3.86 Lakh
Return 17.79%	Return 17.07%

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Diversification

Within Asset Classes

Equity

Fixed Income

Others

Based on your need and risk profile

Within An Asset Class

Equity Funds

Based On style

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Final Thoughts

Golden rule of Successful Investing = Equity + Long Term + Diversification

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Lets Succeed Together

"Find the Right Mutual Fund Distributor and follow his advice"

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6. Marketing event – Crème & Cellar

6.1 Event overview and objective

Crème & Cellar is an exclusive, invitation-only marketing event hosted by PD Wealth. Designed as a refined afternoon of artisanal wine, curated food pairings, and authentic conversations, the event serves as a relationship-building initiative for high-net-worth individuals, financial advisors, and stakeholders.

- Strengthen trust and human connection between PD Wealth and clients
- Position PD Wealth as an elevated, culturally aware brand
- Introduce or reinforce PD Wealth's long-term investment philosophy
- Generate content and storytelling touchpoints for future brand use

6. Marketing event – Crème & Cellar

6.2 Concept & theme development

The event merges the richness of wine culture with the depth of financial wisdom. Inspired by the textures of cellars and the elegance of cream (Crème), the concept reflects taste, maturity, and refined luxury — all values aligned with wealth stewardship.

Theme Keywords:

- “Aged to Trust”
- “Sip. Savor. Secure.”
- “Taste, Trust, and Timeless Connections”

6. Marketing event – Crème & Cellar

6.3 Event identity design

The event has its own special logo, designed using a serif font that feels classic and elegant — similar to what you’d see on vintage wine labels. The ampersand (&) is styled in a way that visually connects the words “Crème” and “Cellar,” showing a sense of balance and unity.

Color Palette:

- Burgundy Red (primary wine color)
- Cream/Ivory (neutral backdrop)
- Matte Gold (for accents)
- Dusty Pink or Rosé (highlight)

Typography

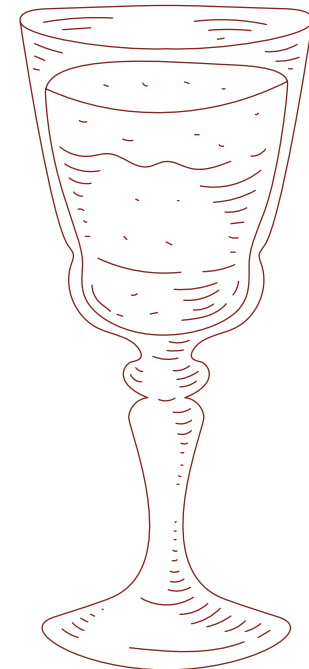
- Headline: Classic serif with personality
- Body: Clean modern sans-serif for readability
- Use of italic style for tasting notes and highlights

6. Marketing event – Crème & Cellar

6.3 Event identity design – Logo and description

The Crème & Cellar logo combines a classic serif wordmark with a hand-drawn wine glass illustration. The curved text placement adds a sense of movement and elegance, while the illustration gives it a warm, artisanal feel — capturing the essence of refined taste and meaningful gatherings.

Crème & Cellar



6. Marketing event – Crème & Cellar

6.3 Event identity design – Brand identity

Crème & Cellar's brand identity combines elegance with warmth, using a classic serif font and hand-drawn wine glass to create a refined, personal feel.

Simple line illustrations of drinks add an artisanal touch, while the PP Editorial New typeface brings a sense of sophistication and style.

The warm color palette—featuring wine red, soft cream, pinks, and muted blue—creates a welcoming, high-end atmosphere. Together, the elements reflect a thoughtfully designed event focused on taste, connection, and meaningful experiences.



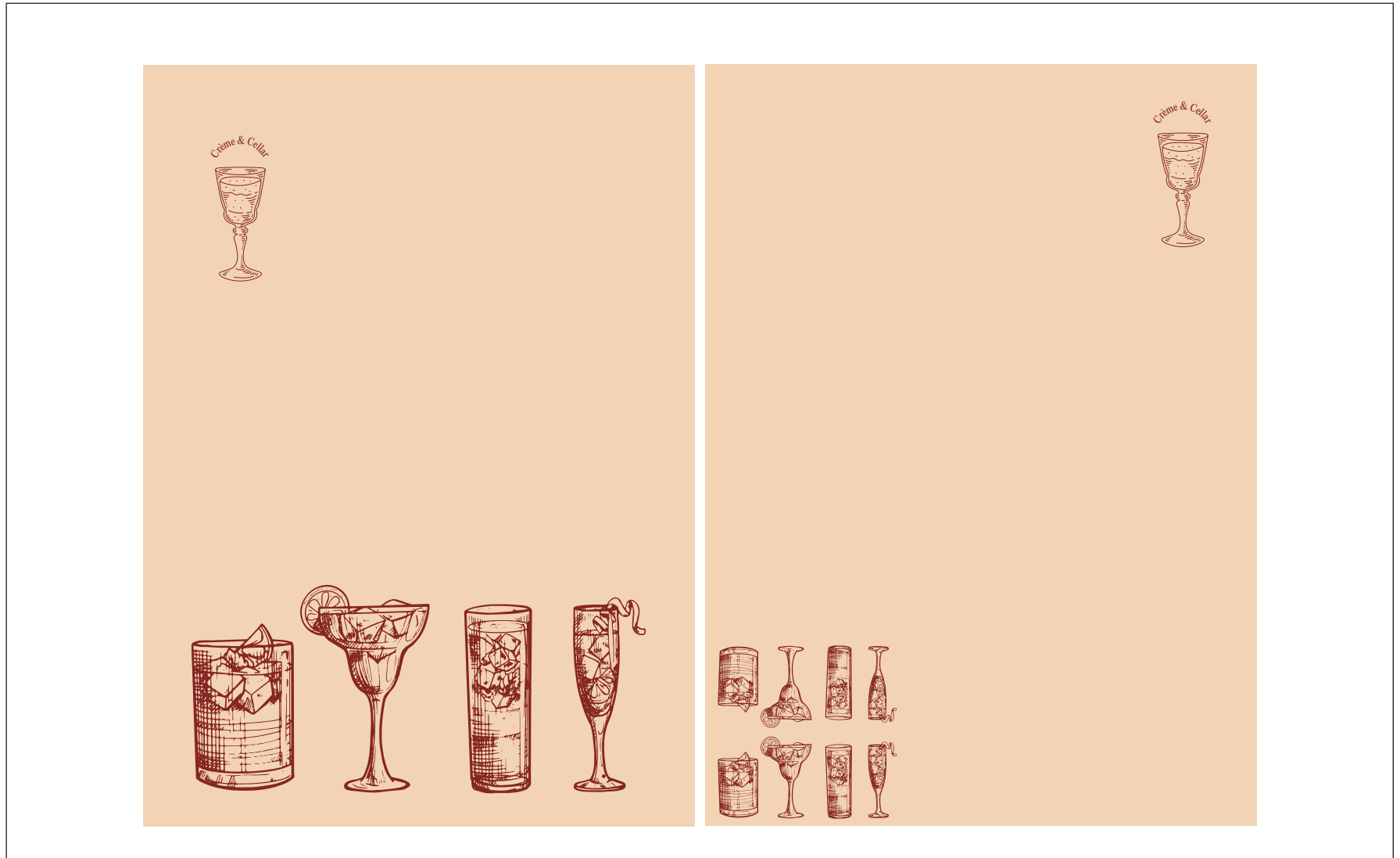
6. Marketing event – Crème & Cellar

6.4 Print collateral – Invitation design



6. Marketing event – Crème & Cellar

6.4 Print collateral – Envelope design



6. Marketing event – Crème & Cellar

6.4 Print collateral – Coaster design



6. Marketing event – Crème & Cellar

6.4 Print collateral – Poster design



6. Marketing event – Crème & Cellar

6.5 Menu Design



7. Learnings

7.1 Reflections

- This project helped me understand the full process of branding — from research and strategy to designing the visuals and applying them across different platforms.
- Designing for a financial brand like PD Wealth made me realize how important it is to create a sense of trust and simplicity in communication.
- I saw how each part of the brand — from the logo to the tone of voice — works together to shape how people feel about it.
- It was interesting to see how a strong story and personality can make a finance brand feel more relatable and human.
- I also learned how to think more strategically while designing, making sure every choice supports the brand's bigger goals.

6. Marketing event – Crème & Cellar

7.2 learnings

- Branding is more than just creating a logo — it's about building a full identity system that works across different media.
- Doing research and understanding the target audience helped me create a design that truly connects with people.
- I learned how important it is for a visual identity to be flexible, so it looks good and stays consistent in every format — digital or print.
- Every design decision — from color to font — needs to have a clear reason and support the brand's message.
- This project made me more confident in explaining my design choices and presenting them clearly to others.
- Overall, I learned how design can build trust, emotion, and a strong connection between the brand and its audience.