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Investing beyond borders: A changing approach to global portfolio allocation

In conversation with

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A Globally Diversified Investment Approach

Affluent Indians residing in Dubai are increasingly adopting a global approach to investing, constructing portfolios across geographies and asset classes to capture opportunities across markets.

India remains a strategic allocation, typically accounting for 20–25% of client portfolios, while the U.S. accounts for a significant share of allocations, often accounting for 50–75% of investments. This reflects a diversified approach, with capital allocated across markets based on opportunity.

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Connecting Global Wealth with Indian Opportunities

Nuvama Private's DIFC office serves as the firm's international wealth hub, connecting clients to its domestic platform and GIFT City (IFSC) structures for cross-border wealth management.

Vishwajit Patil shares that client portfolios maintain a core allocation to the U.S., with selective exposure to Europe, the UK and East Asia. A representative USD 5 million portfolio follows a 60:40 asset allocation, with 60% in fixed-income securities and 40% across equities, derivative products, currencies and commodities.

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India continues to remain a Strategic Allocation

While global diversification continues to shape portfolio construction, Vishwajit Patil notes that investor confidence in India has remained resilient, supported by improving earnings expectations and strong long-term economic fundamentals. Although U.S. assets continue to represent the largest share of global allocations, India remains a strategic allocation within diversified portfolios focused on long-term growth.