



PMS AIF WORLD
High Performance Investing

APRIL, 2025 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH

APRIL, 2025

PREPARED BY

PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Riding the Rebound: The Nifty 50's Tale of Strength, Speed, and Staying Power



Kamal Manocha

Founder & CEO

Dear Investors,

Picture yourself standing at the shore, watching the ocean pull back. For a moment, everything looks still emptied out, even a little eerie. But wait. That pause is just a part of the rhythm. Because soon, the tide returns, often faster and stronger than before. The stock market moves in much the same way. After every pullback, there's a powerful comeback and the Nifty 50 has been riding that rhythm for decades.

Since 1996, the Nifty 50 has faced 16 major downturns. On average, each drop has been around 25% enough to shake confidence and stir doubt. But here's the part many miss: every single time, the index has come back. Not only did it recover its losses, but it surged past its previous highs. On average, it took about nine months to bounce back. In many cases, just six months. Even during moments of global chaos like the 2008 financial crisis the Nifty found its footing and eventually sprinted ahead.

The real magic happens after the worst is over. Once the market hits bottom, the recovery often begins quietly, but gains momentum with surprising speed. Historically, the Nifty has jumped nearly 10% in the first month after a crash. Within three months, it's up over 20%. Give it a year, and you're looking at an average gain of over 40%. These early months aren't just recovery they're acceleration. And those who stay invested through the uncertainty are often the ones who benefit the most.

Take a look at some of the hardest moments in market history. When the Dot-Com bubble burst, the Nifty fell by half. It took time to recover, but that painful reset set the stage for a lasting bull run. In 2008, during the global financial meltdown, the index plunged nearly 60% but was back to strength within two years. And in 2020, when COVID-19 rattled the world and sent markets tumbling, the Nifty lost 34% in a matter of weeks. Yet in just one year, it came roaring back with an 80% gain. Time and again, what looked like the end turned out to be a new beginning.

And that brings us to the most important point: the rebound doesn't wait. It doesn't announce itself or wait for headlines to turn optimistic. It just starts and often with surprising force. Investors who step away during downturns risk missing the most powerful part of the ride. Discipline, not perfect timing, is what wins in the long run. In the end, the story of the Nifty 50 isn't just one of resilience it's a lesson in conviction. Because those who stay in the water, even when the tide is low, are the ones who catch the biggest waves when they return.



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Riding the Rebound: The Nifty 50's Tale of Strength, Speed, and Staying Power

Correction Start	Peak Price	Trough Date	Trough Price	Recovery Date	Recovery Price	Time to Recover (weeks)	Return 24w after trough	Return 52w after trough
Jul-96	1196.06	Dec-96	808.19	Jun-97	1216.09	30	27.90	24.51
Aug-97	1256.95	Nov-98	810.85	Jul-99	1324.25	33	43.72	72.61
Oct-99	1479.25	Oct-99	1325.45	Dec-99	1480.45	9	14.58	-11.07
Mar-00	1756	Sep-01	854.2	Dec-03	1778.55	117	39.04	13.51
Mar-04	1971.9	Jun-04	1488.5	Nov-04	1996.2	23	32.28	47.42
Apr-05	2154	Apr-05	1902.5	Jun-05	2194.3	8	30.59	87.00
Oct-05	2601.4	Oct-05	2316.05	Nov-05	2620	3	44.45	61.45
May-06	3663.95	Jun-06	2866.3	Oct-06	3676.05	18	37.84	44.61
Feb-07	4187.39	Mar-07	3608.55	May-07	4214.5	9	23.71	31.52
Aug-07	4566.05	Aug-07	4108.05	Sep-07	4837.55	5	29.43	7.85
Jan-08	6274.3	Oct-08	2584	Oct-10	6312.45	106	29.34	93.38
Jan-11	6312.45	Dec-11	4624.3	Dec-13	6313.8	104	11.13	27.77
Jun-15	8937.7	Feb-16	6980.95	Feb-17	8939.5	54	23.74	25.96
Sep-18	11680.5	Oct-18	10030	Apr-19	11752.8	25	16.09	15.49
Mar-20	12352.35	Mar-20	8083.8	Nov-20	12780.25	32	42.32	83.92
Jan-22	18338.55	Jun-22	15293.5	Nov-22	18349.7	21	22.25	23.10



Domestic Indices – 1M Change

SENSEX	77,414.92	5.76%
NIFTY 50	22,519.35	6.30%
NIFTY BANK	51,564.85	6.66%
NIFTY MIDCAP 100	51,672.25	7.84%
NIFTY SMALLCAP 100	16,095.70	9.49%

*Data as of 31st Mar 2025

Global Indices – 1M Change

DOW JONES	42,001.76	-4.20%
NASDAQ 100	19,278.41	-7.69%
S&P 500	5,611.84	0.86%
SHANGAI COMP	3,728.90	+ 0.86%
NIKKEI 225	35,977	3.07%

*Data as of 31st Mar 2025

NIFTY Indices – 1M & 1Y Change

IT	-1.16%	5.70%
PHARMA	-6.68%	11.27%
PSU BANK	10.82%	-10.62%
PVT BANK	6.23%	9.24%
AUTO	3.89%	-0.58%
METAL	10.62%	2.73%
FMCG	5.72%	6.66%
INFRA	10.34%	6.53%

*Data as of 31st Mar 2025

Price-to-Earnings (PE) Ratio

NIFTY 50

20.8

NIFTY 500

22.9

NIFTY MIDCAP 100

31.8

NIFTY SMALLCAP 100

28.2



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Top 10 Portfolios In Each Peer Group (Data as of 31st Mar 2025)

Peer Group 1: Ten Year Plus Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Market Cap
ValueQuest	Platinum Scheme	-	3.92%	-16.62%	-17.60%	6.94%	29.84%	17.14%	38.63%	18.79%	19.55%	Multi Cap
Nine Rivers capital	Aurum Small Cap Oppprtunities	-	3.90%	-19.40%	-21.10%	-4.10%	24.60%	14.40%	41.90%	16.10%	25.69%	Small Cap
Care PMS	Growth Plus Value	794	9.10%	-8.90%	-17.50%	13.50%	31.30%	13.40%	40.50%	14.10%	21.10%	Mid & Small Cap
Girik Capital	Multicap Growth Equity Strategy	1503.58	5.04%	-7.66%	-11.94%	11.52%	36.22%	18.57%	26.88%	18.16%	20.28%	Multi Cap
ICICI Prudential PMS	Value Strategy	814.95	7.29%	-6.00%	-13.00%	5.00%	33.00%	25.00%	31.00%	15.00%	13.00%	Multi Cap
Motilal Oswal AMC	Value Migration	3,232.04	9.10%	-16.90%	-16.70%	10.20%	32.20%	19.70%	17.50%	25.00%	19.50%	Large Cap
ValueQuest	Growth Scheme	-	3.39%	-15.44%	-18.09%	5.70%	26.96%	16.42%	34.96%	14.00%	17.65%	Multi Cap
ICICI Prudential PMS	Largecap Strategy	605.13	9.50%	-1.61%	-11.42%	8.45%	28.53%	19.05%	30.86%	13.90%	16.36%	Large Cap
Alchemy Capital Management	Select Stock	3886	5.80%	-16.90%	-14.30%	8.20%	27.80%	13.20%	26.60%	14.00%	19.60%	Multi Cap
Kotak AMC	India Focus	740	6.50%	-7.90%	-8.30%	15.20%	27.00%	14.50%	30.70%	11.70%	15.30%	Multi Cap
Peer Group 2: Five Year Plus Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6 M	1Y	2Y	3Y	5Y	SI	Market Cap	
Green Lantern Capital LLP	Growth Fund	899.57	4.98%	-4.44%	-5.17%	24.62%	62.03%	47.49%	58.05%	24.97%	Mid & Small Cap	
Equitree Capital Advisors	Emerging Opportunities	612.01	5.71%	-13.45%	-7.69%	38.26%	61.88%	36.79%	51.76%	8.17%	Small Cap	
Stallion Asset	Core Fund	4494.49	6.75%	-13.80%	-9.06%	30.57%	52.73%	32.27%	38.19%	29.59%	Multi Cap	
Invasset LLP	Growth Fund	433.83	8.50%	0.79%	-7.19%	6.13%	55.67%	30.90%	43.64%	33.01%	Multi Cap	
Negen Capital	Special Situations Fund	932	4.63%	-14.18%	-13.53%	18.75%	39.99%	20.01%	50.07%	17.46%	Multi Cap	
Sameeksha Capital	Equity Fund	1529.01	5.20%	-4.10%	-6.40%	13.60%	34.90%	23.90%	37.10%	22.30%	Multi Cap	
ICICI Prudential PMS	PIPE Strategy	5609.11	6.06%	-13.01%	-14.81%	9.39%	31.15%	23.71%	39.69%	27.01%	Small Cap	
Buoyant Capital	Opportunities Multi-cap	4,330.19	8.42%	-1.64%	-5.84%	15.59%	29.23%	21.21%	40.19%	21.66%	Multi Cap	
Motilal Oswal AMC	Mid to Mega	1,632.93	7.10%	-15.60%	-13.70%	12.60%	37.60%	15.80%	31.90%	24.40%	Mid & Small Cap	
SageOne Investment	Core Portfolio	3820	7.60%	-10.60%	-17.50%	10.00%	35.20%	15.40%	34.30%	26.20%	Mid & Small Cap	

- All data is as shared by respective AMC and is as TWRR guidelines.
- Top 10 in each peer group have been determined based on weighted average returns across time periods. Min AUM in 10-year peer group is taken at 600 Cr, in 5 Year at 200 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filer for less than 2Y.
- Data above 1Y is CAGR and upto 1Y is Absolute returns.
- ^ For **Sage One**^, numbers have been taken since the formal inception post the SEBI RIA license and not SEBI PMS license.

Top 10 Portfolios In Each Peer Group (Data as of 31st Mar 2025)

Peer Group 3: Three Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Samvitti Capital	Active Alpha Multicap	363.06	10.01%	-22.18%	-16.80%	6.83%	45.55%	33.80%	-	30.87%	Multi Cap
Carnelian Capital	Shift	3500	9.10%	-12.20%	-10.60%	18.40%	43.30%	28.10%	-	37.80%	Mid & Small Cap
Roha Asset Managers	Emerging Champions	-	9.63%	-16.31%	-13.79%	6.55%	37.16%	20.18%	-	34.11%	Mid & Small Cap
Electrum	Laureate Portfolio	-	4.17%	-21.39%	-16.33%	17.02%	34.15%	23.31%	-	33.07%	Small Cap
Incred PMS	Healthcare Portfolio	275	6.34%	-6.40%	1.28%	36.88%	43.34%	24.98%	-	19.10%	Multi Cap
Abakkus Asset Manager	Emerging Opportunities	4457.17	8.20%	-11.80%	-8.90%	17.90%	33.50%	20.20%	-	31.90%	Mid & Small Cap
SageOne Investment	Large & Midcap Portfolio (SLMP)	150	7.60%	-4.10%	-12.00%	14.90%	32.50%	19.20%	-	19.20%	Large Cap
Incred PMS	Multicap Portfolio	440	5.83%	-14.61%	-16.18%	21.73%	33.12%	21.06%	-	16.61%	Multi Cap
Incred PMS	Small & Midcap	225	5.54%	-18.28%	-18.64%	18.80%	27.24%	21.16%	-	13.84%	Mid & Small Cap
Abakkus Asset Manager	All Cap Approach	3068.07	8.00%	-7.00%	-13.30%	1.80%	21.40%	13.60%	-	25.20%	Multi Cap

Peer Group 4: Two Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category
Investsavvy	Alpha Fund	83.92	7.11%	-19.97%	-19.65%	19.44%	49.99%	-	-	33.19%	Small Cap
Motilal Oswal AMC	Founders	2,401.85	10.67%	-18.65%	-16.03%	12.90%	34.91%	-	-	34.55%	Multi Cap
Bonanza	Aegis	68.89	2.83%	-18.46%	-12.08%	17.15%	37.61%	-	-	26.47%	Multi Cap
Maximal Capital	Pathfinder Value Fund	134.28	5.62%	-9.78%	-13.08%	12.36%	37.05%	-	-	29.48%	Multi Cap
Wallfort PMS	Avenue Fund	101.72	0.72%	-16.49%	-12.62%	7.84%	40.46%	-	-	23.52%	Mid & Small Cap
BugleRock Capital	Special Situations	-	3.83%	-15.15%	-17.13%	-2.51%	29.10%	-	-	30.52%	Small Cap
Valtrust	Valtrust Momentum	-	7.58%	-18.48%	-24.22%	-4.97%	32.68%	-	-	27.84%	Multi Cap
True Beacon Investment Advisors	Equity Factor Quant	390	4.12%	-4.76%	-18.14%	0.53%	28.42%	-	-	20.10%	Multi Cap
Marathon Trends	Trend Following	451.62	7.98%	-14.02%	-17.17%	-2.68%	24.77%	-	-	24.77%	Multi Cap
BAY Capital	India Opportunities Portfolio	-	2.95%	-8.32%	-13.98%	6.36%	21.43%	-	-	16.92%	Mid & Small Cap

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Top 10 Portfolios In Each Peer Group (Data as of 31st Mar 2025)

Peer Group 5: One Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Wallfort PMS	Ameya Fund	68.64	-3.26%	-16.87%	-9.73%	26.13%	-	-	-	51.03%	Mid & Small Cap
Wallfort PMS	India Contra Equity Fund	14.59	4.95%	-11.49%	-6.07%	22.62%	-	-	-	29.86%	Multi Cap
Ckredence	Business Cycle Fund	-	5.47%	-11.19%	-8.61%	10.60%	-	-	-	17.08%	Small Cap
Alchemy Capital Management	Alpha Small Cap	-	8.70%	-13.90%	-14.20%	13.30%	-	-	-	17.20%	Mid & Small Cap
Sowilo	Target Return Aggressive Fund	53.49	5.87%	-20.12%	-20.36%	14.41%	-	-	-	20.43%	Mid & Small Cap
Sowilo	Multicap Fund	101.43	6.84%	-15.04%	-20.57%	10.62%	-	-	-	21.40%	Multi Cap
Alchemy Capital Management	Smart Alpha 250	-	6.90%	-17.50%	-18.20%	3.30%	-	-	-	19.00%	Multi Cap
Abakkus Asset Manager	Diversified Alpha Approach	909.66	5.70%	-8.00%	-13.70%	2.90%	-	-	-	3.50%	Large Cap
Alchemy Capital Management	Alpha 100	-	7.20%	-6.30%	-20.10%	-3.90%	-	-	-	12.10%	Small Cap
Alchemy Capital Management	Smart Alpha Small & Micro Cap	-	6.90%	-22.70%	-21.40%	0.30%	-	-	-	4.70%	Multi Cap

Peer Group 6: Sub One Year Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Qode Advisors LLP PMS	Qode All Weather	17.68	5.34%	3.43%	-	-	-	-	-	2.50%	Multi Cap
Eklavya Capital	Equity	-	3.80%	-0.20%	0.30%	-	-	-	-	4.55%	Multi Cap
Qode Advisors LLP PMS	Qode Tactical Fund	8.39	5.92%	-0.63%	-	-	-	-	-	-1.52%	Multi Cap
Elever	FACTOR INCOME PMS	6.1	4.52%	-1.80%	-	-	-	-	-	-1.76%	Multi Cap
Elever	FACTOR SHIELDS PMS	1.64	6.81%	-1.51%	-	-	-	-	-	-4.73%	Multi Cap
Pace 360	Smart Alpha	-	6.00%	-5.41%	-6.11%	-	-	-	-	-1.96%	Multi Cap
TCG	TGP PMS	-	5.20%	-5.90%	-	-	-	-	-	-6.30%	Small Cap
Prudent Equity Private Limited	Growth Strategy	-	4.48%	-7.23%	-9.64%	-	-	-	-	-6.96%	Multi Cap
Axis AMC	Emerging Stars	94.7	6.68%	-12.16%	-12.55%	-	-	-	-	-5.06%	Mid & Small Cap
Wallfort PMS	Focus Fund	23.79	5.26%	-10.64%	-12.63%	-	-	-	-	-6.98%	Mid & Small Cap

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- Data above 1Y is CAGR and upto 1Y is Absolute returns.

Top 10 Portfolios In Each Peer Group (Data as of 31st Mar 2025)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
AccuraCap	PicoPower	499.94	10.10%	-16.90%	-17.10%	6.30%	29.40%	15.00%	36.40%	16.40%	22.50%	Small Cap
Master Trust	India Growth Strategy	339.58	7.41%	-12.47%	-16.79%	-0.83%	18.89%	12.62%	35.61%	20.42%	24.68%	Mid & Small Cap
Bonanza	Value	34.31	5.42%	-16.87%	-15.85%	-7.21%	31.13%	15.86%	24.80%	14.01%	19.24%	Multi Cap
ABANS	Smart Beta Portfolio	469.97	6.67%	-6.18%	-11.25%	12.03%	29.29%	18.33%	28.61%	14.01%	14.50%	Mid & Small Cap
NAFA Asset	Emerging Bluechip	-	3.78%	-15.50%	-21.60%	6.04%	23.89%	13.92%	34.09%	16.13%	15.54%	Multi Cap
Quest Investment	Multi PMS	-	6.34%	-16.70%	-18.79%	5.57%	27.04%	14.47%	28.84%	15.61%	15.59%	Multi Cap
Wallfort PMS	Wallfort Diversified Fund	117.94	2.30%	-20.36%	-24.14%	35.62%	59.92%	34.43%	50.43%	-	22.97%	Mid & Small Cap
Green Lantern Capital LLP	Alpha Fund	48.45	6.20%	-4.06%	-10.59%	12.93%	43.52%	32.67%	41.88%	-	34.14%	Large Cap
Asit C Mehta	Ace Multicap	146.4	5.78%	-8.78%	-14.52%	1.87%	44.12%	31.36%	39.66%	-	19.59%	Multi Cap
Carnelian Capital	Contra Portfolio Strategy	80	8.50%	-9.30%	-18.90%	6.50%	43.10%	32.30%	-	-	31.40%	Multi Cap

- The 7th Category captures those PMS names, which have a track record of very good performance, but were not captured in the 6 peer groups as these strategies have lower AUM than what is kept as a filter in the respective 6 Peer Groups.
- Top 10 in each peer group have been determined based on weighted average returns across time period. Min AUM in 10-year peer group is taken at 600 Cr, in 5 Year at 200 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filter for less than 2Y.
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Top 10 Portfolios In Each Peer Group (Data as of 31st Mar 2025)

Peer Group 8: Best as per March 2025 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
MOAT Financial Services	Uppercrust Wealth Fund	97.26	14.90%	-10.48%	-11.98%	14.85%	35.04%	18.17%	-	-	14.83%	Multi Cap
ASK	Emerging Opportunities	573	12.91%	-8.34%	-13.36%	4.90%	18.25%	8.38%	20.19%	-	11.27%	Mid & Small Cap
Pace 360	Tresor Flexi	-	12.23%	-0.74%	-6.51%	6.02%	14.39%	13.08%	-	-	12.95%	Multi Cap
Silverarch	India Equity Portfolio	-	11.08%	-12.37%	-16.34%	8.47%	34.58%	17.00%	26.40%	-	12.39%	Multi Cap
Anand Rathi Advisors Ltd	Impress Portfolio	-	11.00%	-12.60%	-7.20%	20.90%	29.80%	20.00%	34.50%	-	14.80%	Multi Cap
Carnelian Capital	Compounder Strategy	700	10.90%	-7.50%	-11.10%	8.10%	29.20%	18.20%	25.30%	-	18.00%	Multi Cap
Qode Advisors LLP PMS	Qode Future Horizons	4.99	10.86%	-16.21%	-	-	-	-	-	-	-16.96%	Small Cap
Motilal Oswal AMC	Founders	2,401.85	10.67%	-18.65%	-16.03%	12.90%	34.91%	-	-	-	34.55%	Multi Cap
AccuraCap	PicoPower	499.94	10.10%	-16.90%	-17.10%	6.30%	29.40%	15.00%	36.40%	16.40%	22.50%	Small Cap
MOAT Financial Services	Uppercrust Growth Fund	35.58	10.04%	-7.51%	-12.28%	10.45%	28.08%	17.21%	-	-	17.17%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	6.30%	-0.30%	-8.50%	6.70%	17.80%	11.70%	23.70%	12.10%
BSE 500 TRI	7.30%	-4.40%	-11.80%	6.00%	21.90%	13.80%	26.30%	13.20%

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- Data above 1Y is CAGR and upto 1Y is Absolute returns.

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