



**PMS AIF WORLD**  
High Performance Investing

**AUGUST, 2022 NEWSLETTER**

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# **TOP 10 PORTFOLIOS IN EACH PEER GROUP**

**MONTH**  
AUGUST, 2022

**PREPARED BY**  
PMS AIF WORLD

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**MONTHLY PERFORMANCE REPORT**

## India after 75 years at the Cusp of a Breakout



Kamal Manocha

CEO,  
PMS AIF World

Dear Investors,

Hope you are keeping well.

India is gearing up to celebrate its 75th Independence Day on August 15, 2022 and as we inch closer to the big day, let's look at the Indian economy & how far we've come.

The moment India gained its independence marked a turning point in economic history.

Historically, India has been the largest economy in the world for most of the two millennia from the 1st until the 19th century. But, due to Britain's ongoing deindustrialization, the nation was in an unsustainable state of poverty. Less than one in six Indians could read and write. India's survival as a single country had been called into question due to the extreme poverty and stark social divides.

Looking back upon history, we have come a long way & progressed exponentially as an economy. Once branded a "third world country," India is now among the biggest economies of the world. The Indian economy, which, a decade ago, didn't even make the cut in the list of Top 10 economies, is currently the 5<sup>th</sup> largest economy in the world this year (according to IMF, based on GDP estimates). There's still a long way to go for India, though.

Being the 3<sup>rd</sup> largest contributor to the world economic growth, despite unresolved & ongoing conflicts with its 2 neighbours, India is in friendly terms & positive relations with almost all other countries.

# India after 75 years at the Cusp of a Breakout

Here's a look at India's economic journey in 5 points:

**1. Food Production:** One of India's biggest achievement post-independence is attaining 'self-sufficiency.' From receiving food aid in the 1950s and 1960s to becoming a net exporter, India has seen a turnaround in food production. The total food production, which stood at 54.92 million tonnes in 1950, rose to 316.06 million tonnes in 2021-22.

**2. Gross Domestic Product (GDP):** From independence in 1947 until 1991, successive governments promoted protectionist economic policies, with extensive state intervention and economic regulation. An acute balance of payments crisis in 1991 led to the adoption of a broad economic liberalisation in India. Since the start of the 21st century, annual average GDP growth has been 6% to 7% and from 2013 to 2018, India was the world's fastest growing major economy, surpassing China. Today, India is the world's fifth-largest economy by nominal GDP (Rs 236.6 lakh crore as of FY 21-22) and it has grown more than 10 times since reforms process started in 1991.

Top 5 world economies as per IMF's current estimates of nominal GDP are:

United States: ~Rs 2016 lakh crore  
China: ~Rs 1584 lakh crore  
Japan: ~Rs 390 lakh crore  
Germany: ~Rs 338 lakh crore  
India: Rs 236 lakh crore (recorded data)

**3. US Dollar to Rupee & Forex Reserves:** At the time of independence, a US dollar was equal to Rs 3.30 in 1947. As of August 2022, a US dollar is approximately equal to Rs 80.

India's foreign exchange reserves in 1950–51 were a pitiful Rs 1,029 crore (in foreign currencies and other assets including gold). In fact, India's low forex reserves played the catalytical role in kickstarting the economic reforms.

## India after 75 years at the Cusp of a Breakout

In 1991, India had barely \$1.2 billion in foreign exchange reserves, or enough to cover imports for three weeks only. Three decades since the reform process began, India's foreign exchange reserves were placed at \$ 573.9 billion as of July 29, 2022.

**4. Foreign Direct Investment (FDI):** In 1948, the total foreign investment in India stood at Rs 256 crore. However, since the 1991 liberalisation, FDI has become the buzzword of India's economic story. Foreign direct investment in India is the sum of equity capital, reinvestment of earnings, other long-term capital, and short-term capital as shown in the balance of payments. India has been a popular destination for foreign direct investment (FDI) since 1991. The country has been ranked among the top 10 FDI destinations in the world for eight consecutive years. The Indian government has taken various steps to make it easier for foreign investors to do business in India. Despite the ongoing pandemic and global developments, India received the highest annual FDI inflows of USD 84,835 million in FY 21-22 overtaking last year's FDI by USD 2.87 billion.

**5. Sensex & Nifty:** Having completed 40+ years into existence, the 30-share Sensex, India's oldest stock market index was launched in 1986, but 1 April 1979 is the base year when the index was set at 100. The Sensex touched the four-digit figure for the first time in 1990. On 25 July 1990, the Sensex closed at 1,001 and it has grown multi-fold since then. The Sensex is seen as the barometer of India's growth and reflects the changes in the economy over time. At the time of writing this in August 2022, the Sensex is currently trading at 58,700 levels, i.e. a CAGR of ~17% since inception (excluding dividends).

India has come a long way since its independence from the British rule 70 years ago, and so have the country's stock markets. In 1996, the National Stock Exchange (NSE) created and administered a settlement fund and launched Nifty 50 Index (a broader benchmark index as compared to Sensex) with a base value of 1000. At the time of writing this in August 2022, Nifty is currently trading at 17,500 levels, i.e. a CAGR of ~12% p.a. since inception (excluding dividends).

# India after 75 years at the Cusp of a Breakout

## Why is Indian economy at the cusp of a massive growth cycle?

India is the world's sixth-largest consumer market and has been a member of the World Trade Organization since 1 January 1995. As of 2020, it ranks 63rd on the Ease of doing business index and 68th on the Global Competitiveness Report. With 50 crore workers, the Indian labour force is the world's second-largest. India has one of the world's highest number of billionaires. The country has free trade agreements with several nations, including ASEAN, SAFTA, Mercosur, South Korea, Japan, and several others which are in effect or under negotiating stage.

The service sector makes up 50% of GDP and remains the fastest growing sector, while the industrial sector and the agricultural sector employs a majority of the labour force. India is the world's sixth-largest manufacturer, representing 2.6% of global manufacturing output.

Nearly 66% of India's population is rural and contributes about 50% of India's GDP. India is the world's largest manufacturer of generic drugs, and its pharmaceutical sector fulfils over 50% of the global demand for vaccines. The Indian IT industry is a major exporter of IT services with \$196 billion in revenue and employs over 4.47 million people. India's chemical industry is extremely diversified and estimated at \$178 billion. The tourism industry contributes about 9.2% of India's GDP and employs over 4.2 crore (42 million) people. The construction and real estate sector ranks third among the 14 major sectors in terms of direct, indirect, and induced effects in all sectors of the economy. The Indian textiles industry is estimated at \$100 billion and contributes 13% of industrial output and 2.3% of India's GDP while employs over 4.5 crore (45 million) people directly. India's telecommunication industry is the world's second largest by the number of mobile phone, smartphone, and internet users. It is the world's 24th-largest oil producer and the third-largest oil consumer. The Indian automobile industry is the world's fifth-largest by production.

## India after 75 years at the Cusp of a Breakout

India has a retail market worth \$1.17 trillion, which contributes over 10% of India's GDP. It also has one of the world's fastest growing e-commerce markets. India has the world's fourth-largest natural resources, with the mining sector contributing 11% of the country's industrial GDP and 2.5% of total GDP. It is also the world's second-largest coal producer, the second-largest cement producer, the second-largest steel producer, and the third-largest electricity producer.

India has maintained a consistently higher growth rate since the process of reforms was introduced in 1990s. The government has undertaken several measures to make it easier for companies to do business in India. These include the liberalization of FDI norms, streamlining of tax regime, tax incentives to encourage investments, implementing the Goods and Services Tax (GST), and so on.

The year 2022-23 is the 3rd Year of this decade and we see it Optimistically as well as Cautiously for India. The next quarter-century could mark India's rise as a nation, making it an Indian Century in a wholistic way.

The pace, ideology, and policies behind the economic and non-economic reforms adopted over the last decade are leading India to attaining higher ranks in the world economy over the ongoing decade. Having said that, enormous amount of Wealth can be created if one makes the right investments at the right time. Indian economy will only grow on the back of businesses that steer this economic growth for India. The eye to identify this businesses lies with very few professionals, and it is important that your investments are channelized towards these fund managers who can compound your wealth by 10x in the next 10 years.

We, at PMS AIF World are a responsible and long-term investment service provider in the space of Alternates and we are constantly striving to help investors make informed investment decisions. [Book an appointment](#) with our Experts and invest through us in the best quality products.

## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> July 2022)

Peer Group 1: Ten Year Plus Peer Group													
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Market Cap	Fund Manager
Accuracap	Picopower	962.19	8.0%	-5.8%	-8.1%	-4.9%	43.2%	35.7%	13.7%	24.1%	23.2%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	730	7.8%	-4.1%	-8.8%	-0.5%	40.4%	34.0%	12.7%	19.5%	17.1%	Multi Cap	Sameer Shah
Sundaram	SELF	679	9.9%	-4.3%	-6.3%	1.1%	32.8%	26.8%	13.5%	19.4%	17.7%	Mid & Small	Madanagopal Ramu
Alfaccurate	IOP	1224.2	10.7%	2.0%	0.0%	7.3%	30.0%	21.8%	11.0%	20.4%	18.5%	Multi Cap	Rajesh Kothari
Alchemy	High Growth Select Stock	3374	10.1%	-1.5%	-1.9%	10.6%	34.1%	17.0%	11.0%	18.9%	20.2%	Multi Cap	Hiren Ved
ASK	IEP	20100	12.6%	-5.7%	-2.1%	2.4%	27.5%	19.6%	13.1%	20.1%	18.1%	Multi Cap	Chetan Thacker
Girik Capital	MultiCap	770.54	5.4%	-4.6%	-12.7%	-6.8%	23.9%	21.2%	11.5%	21.4%	19.3%	Multi Cap	Charandeep Singh
Sundaram	SISOP	1034	9.3%	-4.6%	-5.2%	1.2%	27.9%	22.1%	12.9%	15.7%	17.8%	Multi Cap	Madanagopal Ramu
Motilal	NTDOP	7679	10.7%	-0.8%	-7.2%	-1.0%	23.8%	14.6%	7.7%	19.1%	15.0%	Multi Cap	Manish Sonthalia
Quest	Flagship	758	10.2%	-1.9%	-7.7%	-4.5%	25.7%	16.4%	8.1%	11.5%	16.3%	Multi Cap	Anirudhha Sarkar

Peer Group 2: Five Year Plus Peer Group													
Company	Strategy	AUM (Cr)	1M	3M	6 M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager	
Sage One <sup>^</sup>	Core	2310	8.5%	-8.6%	-10.5%	-8.2%	36.2%	27.6%	14.8%	27.4%	Mid & Small	Samit Vartak	
Aequitas Investment	India Opportunities Product	1269.97	10.5%	-6.5%	0.8%	1.7%	58.2%	29.3%	12.2%	29.5%	Small Cap	Siddhartha Bhaiya	
Nine Rivers	Aurum Small Cap Opp	-	10.3%	0.0%	-3.5%	-3.8%	54.4%	33.0%	13.1%	28.1%	Small Cap	Sandeep Daga	
Buoyant	Opportunities Multicap	482	10.8%	-1.9%	-7.5%	8.9%	53.7%	25.8%	15.3%	20.7%	Multi Cap	Sachin Khivasara	
UNIFI	Blended - Rangoli	-	8.6%	-2.2%	-4.4%	3.0%	38.8%	38.4%	21.0%	22.4%	Mid & Small	Sarath K. Reddy	
SBI	ESG Portfolio	-	9.8%	2.8%	4.5%	13.6%	44.2%	28.8%	17.0%	15.8%	Multi Cap	Gaurav Mehta	
Sameeksha	Equity	562.8	7.1%	-2.0%	-7.1%	-0.8%	34.0%	30.8%	17.4%	19.9%	Multi Cap	Bhavin Shah	
Aditya Birla	SSP	298	12.1%	2.0%	1.3%	0.4%	43.7%	26.2%	8.5%	15.4%	Mid & Small	Vishal Gajwani	
ITUS Capital <sup>^</sup>	Fundamental Value Fund	761.37	6.7%	-3.1%	-3.4%	-3.7%	21.9%	23.2%	23.7%	20.3%	Mid & Small	Naveen Chandramohan	
Ambit	Coffee Can	962.13	13.3%	1.1%	-1.1%	5.1%	21.6%	19.6%	17.2%	18.4%	Multi Cap	Manish Jain	

• 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 250 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.

<sup>^</sup> For Sage One<sup>^</sup> & Itus<sup>^</sup>, 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 31<sup>st</sup> July 2022)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Sage One	Small Cap	670	11.9%	-7.2%	-8.1%	4.3%	51.5%	44.0%	-	33.7%	Small Cap	Samit Vartak
Negen Capital	Special Situations & Tech Fund	338.6	9.1%	-3.8%	-1.7%	11.9%	74.2%	36.3%	-	14.3%	Multi Cap	Neil Bahal
Green	Special	171.51	10.4%	-3.0%	-0.5%	3.7%	45.5%	32.7%	-	27.5%	Multi Cap	Divam Sharma
Wize Market Analytics	Capital Mind-Momentum	426.08	4.4%	-6.2%	-7.0%	-9.0%	30.4%	29.6%	-	25.1%	Multi Cap	Anoop Vijaykumar
Ambit	Emerging Giants	615.48	11.1%	0.3%	-4.1%	0.4%	34.5%	31.6%	-	15.0%	Small Cap	Aishvarya Dadheech
Stallion	Core Fund	572.01	11.8%	-2.0%	-4.4%	-5.7%	29.0%	27.5%	-	23.4%	Multi Cap	Amit Jeswani
UNIFI	BCAD	-	9.5%	-1.9%	-8.8%	1.7%	31.0%	25.6%	-	14.7%	Mid & Small	Sarath K. Reddy
Lake Water	Lake Water	-	17.4%	-2.1%	-8.0%	-4.7%	31.5%	22.1%	-	16.5%	Multi Cap	Pankaj Singhania
White OAK	Pioneers	7785	10.0%	-2.0%	-4.4%	-0.3%	26.5%	24.1%	-	19.0%	Multi Cap	Team White Oak
ICICI	Contra	886.5	12.7%	-2.0%	-2.1%	4.1%	30.9%	20.5%	-	16.3%	Multi Cap	Anand Shah

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
KRIIS	Multi Cap Advantage	90	10.9%	0.9%	-4.2%	1.6%	48.0%	-	-	38.4%	Multi Cap	Rakesh Doshi
ICICI	PIPE	756	10.8%	-1.2%	5.5%	5.9%	46.8%	-	-	27.5%	Small Cap	Anand Shah
Marcellus	Little Champs	939	10.3%	-0.1%	-2.8%	-0.6%	35.7%	-	-	31.1%	Small Cap	Ashvin Shetty
Invasset	Growth	50.07	11.2%	-4.8%	2.6%	-5.9%	43.4%	-	-	28.2%	Multi Cap	Rajnish Garg
First Global	50	-	7.7%	-2.6%	-7.4%	-2.7%	31.7%	-	-	28.4%	Multi Cap	Devina Mehra
Helios	India Rising	624.89	10.0%	0.3%	-4.3%	1.6%	23.8%	-	-	25.9%	Multi Cap	Dinshaw Irani
SMC	Growth	67.4	9.5%	1.4%	-2.2%	4.0%	29.4%	-	-	14.5%	Multi Cap	Ayush Aggarwal
Alchemy	Ascent	421	8.7%	-10.7%	-12.7%	-9.4%	36.0%	-	-	16.0%	Multi Cap	Hiren Ved
Motilal	Focused Mid Cap	307	7.1%	-11.9%	-14.9%	-13.8%	26.9%	-	-	24.7%	Mid & Small	Rakesh Tarway
Axis	Core & Satellite	87	10.7%	1.5%	-0.7%	3.3%	22.5%	-	-	11.6%	Multi Cap	Jinesh Gopani

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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 31<sup>st</sup> July 2022)

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM( Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Moat	Aggressive Leaders Fund	-	5.4%	-3.1%	-5.1%	6.6%	-	-	-	67.1%	Multi Cap	Koushik Mohan
Arihant AMC	Electrum Laureate	-	8.8%	-5.4%	1.2%	8.2%	-	-	-	44.9%	Mid & Small	Romil Jain
Kunvarji	Multicap Fund	-	9.9%	-0.1%	-1.3%	4.1%	-	-	-	45.6%	Multi Cap	Ravi Diyora
Alfaccurate	AAA Emerging Giants	-	11.6%	1.9%	0.7%	14.5%	-	-	-	28.8%	Mid & Small	Rajesh Kothari
Carnelian	Shift Strategy	-	7.8%	-1.6%	-2.6%	-0.4%	-	-	-	45.4%	Multi Cap	Manoj Bahety
Roha	Emerging Champions	-	7.8%	-6.3%	-11.4%	-1.5%	-	-	-	47.3%	Multi Cap	Dhiraj Sachdev
IIFL	Phoenix	-	10.7%	2.8%	0.1%	8.5%	-	-	-	18.7%	Multi Cap	Anup Maheshwaari
Purnartha	Long Term Equity	-	16.7%	1.6%	1.6%	-0.4%	-	-	-	12.0%	Multi Cap	Rohit Jain
Motilal	Multifactor Equity	-	8.8%	0.2%	-5.2%	3.6%	-	-	-	10.3%	Multi Cap	-
White OAK	India Top 200 PMS	339	10.1%	-1.4%	-5.6%	-0.1%	-	-	-	10.9%	Multi Cap	Team White Oak

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
HEM Securities	IRSS		17.0%	-3.4%	-	-	-	-	-	4.5%	Small Cap	Mohit Nigam
Anand Rathi	Decennium	-	10.8%	-3.7%	1.9%	-	-	-	-	-1.3%	Multi Cap	Mayur Shah
Magadh Capital Advisors LLP	Future Stars	-	8.9%	-7.2%	-7.6%	-	-	-	-	-1.5%	Mid & Small	Vipul Prasad
Ambit	TenX	43.34	11.9%	0.5%	-1.5%	-	-	-	-	-2.7%	Mid & Small	Aishvarya Dadheech
Magadh Capital Advisors LLP	Value For Growth	-	11.1%	-4.6%	-6.1%	-	-	-	-	-6.3%	Multi Cap	Vipul Prasad
Moat	Uppercrust Wealth Fund	-	7.0%	-7.5%	-9.9%	-	-	-	-	-12.9%	Multi Cap	Koushik Mohan
Marcellus	Rising Giants	362	11.0%	-4.1%	-12.7%	-	-	-	-	-16.5%	Mid & Small	Ashvin Shetty
White OAK	India Digital Leaders	116	12.3%	-4.1%	-9.6%	-	-	-	-	-17.7%	Multi Cap	Team White Oak

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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 31<sup>st</sup> July 2022)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Right Horizons	Under Served	-	7.6%	-0.9%	12.6%	27.9%	61.6%	39.6%	18.4%	20.9%	18.4%	Small Cap
Master Portfolio	MPSL Vallum India Discovery	504.71	11.3%	-4.1%	-7.1%	-1.9%	41.9%	30.9%	14.1%	29.1%	26.5%	Mid & Small
Care	Growth Plus Value	518	6.1%	-10.4%	-3.5%	-1.6%	51.8%	32.4%	7.8%	24.9%	21.3%	Mid & Small
Sundaram	Voyager	274	9.5%	-4.6%	-7.5%	0.2%	31.3%	26.8%	14.8%	21.7%	20.3%	Multi Cap
Kotak	Small & Mid cap	31	7.5%	-4.7%	-6.2%	2.7%	42.8%	25.4%	9.0%	17.3%	16.9%	Mid & Small
Narnolia	Multicap	305	8.0%	0.3%	-6.3%	9.2%	29.9%	23.8%	14.9%	20.5%	20.0%	Multi Cap
Sundaram	Rising Stars	82	9.2%	-3.0%	-4.8%	10.4%	40.5%	21.3%	6.7%	18.4%	14.6%	Small Cap
Centrum	Microcap	-	10.2%	2.1%	0.0%	4.0%	58.5%	39.0%	17.5%	-	20.6%	Small Cap
ValueQuest	Platinum Scheme	186	8.6%	-3.9%	-6.1%	8.9%	49.3%	39.3%	20.5%	-	19.0%	Multi Cap
NAFA	Emerging Bluechip	-	8.9%	-5.7%	-3.1%	14.1%	48.1%	30.8%	11.8%	-	20.6%	Mid & Small

- ☐ The 7<sup>th</sup> 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 250 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filer for less than 2Y.
- ☐ All data is as shared by respective AMC and is as TWRR guidelines.
- ☐ Data above 1Y is CAGR and upto 1Y is Absolute returns.

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## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> July 2022)

### Peer Group 8: Best as per July 2022 Performance

Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Lake Water	Lake Water	-	17.4%	-2.1%	-8.0%	-4.7%	31.5%	22.1%	-	-	16.5%	Multi Cap
HEM Securities	IRSS	-	17.0%	-3.4%	-	-	-	-	-	-	4.5%	Small Cap
Purnartha	Long Term Equity	-	16.7%	1.6%	1.6%	-0.4%	-	-	-	-	12.0%	Multi Cap
Marcellus	CCP	7123	14.4%	-0.2%	-2.6%	1.2%	23.5%	23.2%	-	-	19.8%	Multi Cap
ICICI	Value	91.1	14.3%	-3.4%	-2.4%	2.8%	28.7%	16.8%	-	-	15.6%	Multi Cap
Alfaccurate	Focus	-	13.6%	6.2%	3.0%	11.6%	29.5%	21.7%	12.3%	-	14.5%	Multi Cap
Marcellus	Kings Of Capital	617.8	13.5%	0.2%	-6.5%	-3.9%	12.8%	-	-	-	12.6%	Thematic
Ambit	Coffee Can	962.13	13.3%	1.1%	-1.1%	5.1%	21.6%	19.6%	17.2%	-	18.4%	Multi Cap
Right Horizons	AlphaBots	-	13.3%	-2.8%	-1.4%	10.2%	29.6%	17.7%	-	-	13.8%	Thematic
ASK	ISP	4148	13.2%	-2.9%	-3.0%	0.7%	21.1%	16.3%	9.1%	18.6%	15.8%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	8.7%	0.3%	-1.1%	8.9%	24.5%	15.6%	11.2%	12.6%	Large Cap
Nifty 500	9.6%	-0.8%	-1.7%	7.3%	27.4%	17.5%	10.8%	12.5%	Multi Cap
Nifty Mid Cap 100	12.0%	-0.8%	-2.1%	6.5%	38.4%	23.0%	9.9%	-	Mid Cap
Nifty Small Cap 100	8.6%	-10.6%	-17.5%	-12.8%	35.3%	18.4%	3.3%	-	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 period. Min AUM in 10-year peer group is taken at 600 Cr, in 5 Year at 250 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.

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