



PMS AIF WORLD
High Performance Investing

DECEMBER, 2022 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
DECEMBER, 2022

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

What is taking Indian markets to an All-time high?



Kamal Manocha

CEO,
PMS AIF World

Dear Investors,

The post-Covid world had just begun to return to normalcy when it slammed into inflation and recession. Massive lay-offs at MNCs further shrouded the future in more uncertainty. However, amidst all this, Indian indices Sensex and Nifty are making new highs in November 2022. This has left investors confused.

How is the Indian market defying all the global risks?

The reality is that stock market sees what many don't and this astounds investors. Investors focus on the media chatter while markets focus on expected future outcomes. Going by markets' future-focussed thinking, CY22 has been a year of many corrections. And, corrections are always positive for the future... isn't it?

The first correction in year 2022 was due to the resetting of the US Federal Reserve policy stance. US has been enjoying close to 0.25% to 0.50% rates for more than 12 years because rates were cut sharply after the global financial crises of 2008 when the Fed brought rates down from 4.75% to zero. With the last six consecutive rate hikes in CY22, Fed rates have gone back to 3.75% to 4.00%, marking an end to the era of quantitative easing.

The second consequential event has been equities undergoing the reality test of valuations. Some of the major indices, which had enjoyed their best run-ups over the last five to ten years, saw massive correction--both Nasdaq and Hang Seng fell by ~30%. At the same time, Indian markets have hardly seen any fall.

Going by the age-old beliefs in stock markets that 'what doesn't correct during bad times, leads the good times', the recent relative outperformance of Indian bourses over the last 18 months has drawn attention away from the US and China to India. Many global thinkers, economists and stock-market experts believe that India will be the big bull market of this decade.

What is taking Indian markets to an All-time high?

Corporate-earnings booster

The third event, a positive, has been the comeback of corporate earnings growth in India across major sectors. In FY22, corporate earnings-to-GDP ratio bounced back to a decade high of 4.5%. While lay-off is the buzzword across advanced economies and MNCs, domestic companies in India are in capex mode, and economic forums are arguing if India will grow at 6.5% or at 7.5%.

Rise in corporate earnings brought correction in equities as reflected by the fall in Nifty 50 PE multiples. Nifty's Price-to-Earning (PE) Ratio was ~35 in November 2020, today, in November 2022, it stands at ~22. This goes on to justify that even though the index is at an ATH, valuations have corrected by almost 40% and this is why markets look attractive, despite being at ATHs. These valuations are similar to what they were after the Covid corrections--March 2020, Nifty PE was at ~21.

Fourthly, recession in advanced economies would significantly bring down the imported inflation risk for India as commodity prices cool. If we consider that India imports more than 80% of its energy requirement, then falling crude oil prices will help bring the country's trade deficit down and this can have a cascading impact on varied sectors of the economy.

Fifthly, with global supply chains moving away from China to other geographies, India could emerge as a manufacturing hub. Currently, China is the number one manufacturing hub responsible for around one-third of the global manufacturing output. But years 2020 and 2021 have shown the world what over dependence on China can do.

Finally, with the series of rate hikes taken by central banks over the last 11 months in CY22, recession is likely to emerge as the bigger risk than inflation. And, we have seen what happens to stock markets when monetary policy turns dovish and focus returns to growth—whether during the global financial crises or during the pandemic.

What is taking Indian markets to an All-time high?

The big picture is that by the end of this decade, India's GDP is anticipated to more than double from over \$3.5 trillion to over \$7 trillion. According to a Morgan Stanley analysis, the nation's economy and stock market are expected to grow to be the third-largest in the world in this decade. And, following the Indian equities' data of over the last two decades, Nifty and Sensex have never seen a correction or a consolidation phase for more than 15 months. And, between August 2021 and November 2022, it has already been a period of 15 months with almost 0% returns from Nifty and Sensex.



Viewing policy actions and market cues optimistically, the corrections of 2022 offer investment opportunities. Also, we can soon see a reversal in FII's stance and flows, back in favour of Indian equities. With DII flows steadily increasing, there would soon be a scenario of buyers outweighing sellers, taking markets to newer heights.

Of course, there will be short to medium-term volatility and equities are never without risk. Therefore, it's all about making informed choices for the long term.



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RIGHT HORIZONS
Guiding you in achieving your goals...

Top 10 Portfolios In Each Peer Group (Data as of 30th November 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	958.01	1.5%	0.5%	5.4%	-1.8%	26.5%	33.7%	11.5%	21.9%	22.9%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	756.29	-1.0%	-4.1%	6.0%	-1.3%	29.4%	29.8%	11.0%	16.4%	16.8%	Multi Cap	Sameer Shah
Alfaccurate	IOP	1365.13	2.0%	2.4%	13.2%	6.9%	23.1%	21.0%	9.9%	18.9%	18.6%	Multi Cap	Rajesh Kothari
Sundaram	SELF	713	-0.6%	-3.5%	6.1%	-2.5%	20.4%	22.4%	12.6%	18.6%	17.4%	Mid & Small	Madanagopal Ramu
Girik Capital	MultiCap	861	0.8%	2.4%	9.3%	-2.7%	20.0%	20.2%	7.9%	20.4%	19.4%	Multi Cap	Charandeep Singh
Alchemy	High Growth Select Stock	3371	-0.1%	-1.9%	7.1%	0.7%	25.7%	14.4%	10.3%	16.9%	19.8%	Multi Cap	Hiren Ved
ASK	IEP	20638	-0.6%	-2.3%	6.6%	-3.7%	16.2%	15.6%	12.5%	19.1%	17.9%	Multi Cap	Chetan Thacker
Sundaram	SISOP	1103	0.0%	-0.3%	7.5%	-2.3%	17.3%	17.7%	13.1%	15.1%	17.8%	Multi Cap	Madanagopal Ramu
Quest	Flagship	756	2.2%	1.9%	10.3%	0.7%	18.7%	18.4%	8.1%	16.3%	16.4%	Multi Cap	Aniruddha Sarkar
Kotak	India Focus-Series I	430	1.0%	2.2%	7.3%	4.6%	30.1%	17.6%	2.8%	13.5%	13.6%	Multi Cap	Anshul Saigal

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 [^]	Core	1990	-0.8%	-3.6%	-2.4%	-9.0%	22.3%	24.3%	11.6%	26.4%	Mid & Small	Samit Vartak	
Aequitas Investment	India Opportunities	1421.31	5.8%	3.1%	15.0%	23.5%	49.9%	34.1%	7.9%	29.7%	Multi Cap	Siddhartha Bhaiya	
Valentis	Rising Star Opportunity	-	4.7%	11.6%	17.1%	9.5%	52.9%	42.2%	16.3%	18.9%	Small Cap	Jyotivardhan Jaipuria	
Nine Rivers	Aurum Small Cap Opp	-	2.2%	-0.5%	16.8%	9.4%	37.6%	37.6%	11.6%	27.9%	Small Cap	Sandeep Daga	
Negen Capital	Special Situations Fund	461.22	-0.7%	-1.7%	7.3%	8.2%	45.7%	37.2%	12.4%	14.1%	Multi Cap	Neil Bahal	
UNIFI	Blended - Rangoli	-	1.0%	3.2%	11.6%	5.5%	29.0%	38.1%	19.9%	22.3%	Mid & Small	Sarath K. Reddy	
ValueQuest	Platinum Scheme	347.63	0.6%	-2.1%	7.7%	4.8%	36.6%	35.1%	19.2%	18.6%	Multi Cap	Ravi Dharamshi	
Avestha	Growth	440	2.5%	3.5%	16.7%	20.8%	35.0%	25.4%	15.9%	16.0%	Multi Cap	Farokh Pandole	
Buoyant	Opportunities Multicap	612	3.4%	5.0%	14.8%	10.1%	38.1%	25.7%	12.1%	21.2%	Multi Cap	Sachin Khivasara	
SBI	ESG Portfolio	-	-0.1%	-0.3%	11.2%	14.2%	34.0%	26.6%	15.8%	16.0%	Multi Cap	Gaurav Mehta	

• 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.

[^] 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 30th November 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	765	2.3%	-0.2%	6.7%	-0.3%	33.0%	41.1%	-	31.7%	Small Cap	Samit Vartak
ICICI	PIPE	931	2.9%	3.7%	16.2%	18.6%	37.5%	30.0%	-	27.9%	Small Cap	Anand Shah
Green	Special	191.72	0.3%	-3.7%	10.0%	11.5%	33.7%	32.9%	-	26.3%	Multi Cap	Divam Sharma
Wize Market Analytics	Capital Mind-Momentum	522.79	2.5%	3.7%	13.2%	4.1%	28.7%	31.4%	-	26.1%	Multi Cap	Anoop Vijaykumar
ICICI	Contra	1161.9	5.7%	8.5%	22.9%	21.4%	32.5%	24.7%	-	19.2%	Multi Cap	Anand Shah
Marcellus	Little Champs	949	0.4%	-4.0%	5.7%	-1.1%	19.5%	28.1%	-	27.9%	Small Cap	Ashvin Shetty
Stallion	Core Fund	619.44	-1.7%	0.6%	9.8%	-6.8%	19.2%	21.7%	-	23.0%	Multi Cap	Amit Jeswani
Alchemy	Ascent	440	2.7%	5.0%	7.6%	-2.0%	28.2%	17.5%	-	17.3%	Multi Cap	Hiren Ved
White OAK	Pioneers	8491	0.5%	2.0%	10.9%	-0.2%	18.5%	21.1%	-	18.7%	Multi Cap	Team White Oak
IIFL	Multicap Advantage	-	1.8%	2.3%	11.5%	2.7%	16.6%	17.4%	-	14.7%	Multi Cap	Anup Maheshwari

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Electrum Portfolio Managers	Laureate Portfolio	-	3.5%	4.3%	15.1%	19.2%	43.7%	-	-	43.8%	Mid & Small	Romil Jain
Carnelian	Shift Strategy	-	4.3%	4.5%	15.6%	8.5%	43.4%	-	-	44.5%	Mid & Small	Manoj Bahety
Roha	Emerging Champions	-	2.1%	2.5%	9.7%	6.2%	42.3%	-	-	42.9%	Mid & Small	Dhiraj Sachdev
Turtle Wealth	Growth Mantra	100	2.4%	9.2%	11.3%	15.7%	32.2%	-	-	33.1%	Multi Cap	Rohan Mehta
Abakkus	Emerging Opportunities	-	5.1%	5.1%	9.3%	1.6%	36.6%	-	-	37.6%	Mid & Small	Sunil Singhanian
Abakkus	All Cap Approach	-	2.8%	7.3%	9.9%	5.3%	34.2%	-	-	35.4%	Multi Cap	Sunil Singhanian
Invasset	Growth	59.98	3.6%	-2.4%	12.8%	3.8%	25.5%	-	-	28.3%	Multi Cap	Rajnish Garg
First Global	India Super 50	-	3.0%	4.6%	12.3%	0.9%	25.9%	-	-	28.0%	Multi Cap	Devina Mehra
Helios	India Rising	735.17	1.3%	2.8%	11.5%	2.0%	18.4%	-	-	25.4%	Multi Cap	Dinshaw Irani
Motilal	Focused Mid Cap	310.9	-0.8%	0.7%	0.6%	-13.4%	15.3%	-	-	21.8%	Mid & Small	Rakesh Tarway

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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 30th November 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	-	4.1%	4.8%	12.6%	9.8%	-	-	-	44.0%	Multi Cap	Koushik Mohan
Alfaccurate	Budding Beasts	-	0.6%	-0.7%	15.1%	11.6%	-	-	-	27.7%	Mid & Small	Rajesh Kothari
IIFL	Phoenix	-	2.5%	3.7%	17.4%	14.8%	-	-	-	20.6%	Multi Cap	Anup Maheshwari
White Whale LLP	North Star Portfolio	-	1.0%	0.5%	15.2%	1.1%	-	-	-	18.9%	Multi Cap	Hardik Doshi
Magadh Capital Advisors LLP	Future Stars	-	3.3%	6.1%	11.7%	7.7%	-	-	-	6.5%	Mid & Small	Vipul Prasad
White OAK	India Top 200 PMS	358	0.5%	2.1%	11.1%	0.3%	-	-	-	12.8%	Multi Cap	Team White Oak
Magadh Capital Advisors LLP	Value For Growth	-	1.1%	5.0%	13.9%	6.6%	-	-	-	2.1%	Multi Cap	Vipul Prasad
LIC MF	Factor Advantage	-	2.4%	2.6%	12.8%	2.4%	-	-	-	6.8%	Multi Cap	Azeem Ahmed
Profusion Investment	Income Enhancer Fund	-	0.6%	2.3%	3.1%	5.5%	-	-	-	9.0%	Debt	Satyan Wadhwa
ValueQuest	Agile	80.04	-0.3%	-7.7%	1.3%	-0.8%	-	-	-	14.1%	Multi Cap	Ravi Dharmashi

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Carnelian	YnG Strategy	-	6.4%	6.0%	16.5%	-	-	-	-	22.9%	Multi Cap	Manoj Bahety
Green	Impact ESG	-	2.3%	-3.9%	21.5%	-	-	-	-	24.7%	Multi Cap	Divam Sharma
Upside AI	Navigator	-	2.2%	1.0%	3.3%	-	-	-	-	3.1%	Debt	Team Upside AI
Shree Rama Managers LLP	Shree Wealth Builder Plan	9.11	1.7%	-0.2%	-	-	-	-	-	0.1%	Multi Asset	Arindam Samanta
Shree Rama Managers LLP	Shree Lakshmi Plan	11.71	1.5%	5.6%	-	-	-	-	-	7.9%	Multi Cap	Arindam Samanta
Equirus	Core Equity	18.97	1.4%	7.6%	14.6%	-	-	-	-	14.9%	Multi Cap	Gaurav Arora
UNIFI	BCAD2: Breakout 20	-	0.3%	4.5%	16.8%	-	-	-	-	13.5%	Mid & Small	Sarath K. Reddy
Moat	Uppercrust Wealth Fund	-	-0.1%	-2.6%	4.8%	-	-	-	-	-9.9%	Multi Cap	Koushik Mohan
White OAK	Digital Leaders	144	-1.0%	-2.5%	4.4%	-	-	-	-	-17.1%	Multi Cap	Team White Oak
Marcellus	Rising Giants	434	-1.5%	-5.6%	3.7%	-	-	-	-	-16.4%	Mid & Small	Ashvin Shetty

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Top 10 Portfolios In Each Peer Group (Data as of 30th November 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	-	6.5%	2.4%	16.6%	32.5%	56.6%	41.1%	20.0%	19.8%	18.7%	Small Cap
Master Portfolio	MPSL Vallum India Discovery	534.88	3.1%	3.5%	12.4%	5.8%	36.4%	32.5%	13.0%	28.8%	26.9%	Mid & Small
Care	Growth Plus Value	538	0.2%	-1.2%	2.2%	9.4%	39.2%	34.4%	4.9%	21.5%	21.1%	Mid & Small
Narnolia	Multicap	348	2.8%	2.7%	7.9%	3.3%	23.6%	22.7%	15.1%	19.5%	19.9%	Multi Cap
Sundaram	Voyager	290	0.4%	-1.2%	6.5%	-3.1%	20.4%	22.2%	14.0%	20.5%	20.1%	Multi Cap
Sundaram	Rising Stars	87	-2.0%	-1.2%	11.9%	7.7%	28.8%	21.2%	7.1%	17.3%	14.9%	Small Cap
Centrum	Microcap	-	0.2%	0.2%	11.3%	13.6%	31.8%	30.9%	13.4%	-	15.6%	Small Cap
Right Horizons	Flexi Cap	175	3.5%	2.8%	12.4%	5.5%	30.1%	24.7%	13.3%	-	13.5%	Multi Cap
KRIIS	Multi Cap Advantage	93	-1.2%	-8.8%	-1.9%	-9.1%	32.5%	29.9%	-	-	31.9%	Multi Cap
Estee	Long Alpha	26.15	3.0%	3.8%	11.2%	1.7%	26.4%	30.3%	-	-	19.0%	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 250 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filer for less than 2Y.
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Top 10 Portfolios In Each Peer Group (Data as of 30th November 2022)

Peer Group 8: Best as per October 2022 Performance

Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Green	Dividend	14.87	9.0%	8.0%	15.7%	14.9%	35.9%	33.4%	-	-	31.5%	Multi Cap
ICICI	Value	90.8	6.7%	9.7%	24.6%	22.3%	29.2%	21.3%	11.7%		17.2%	Multi Cap
Right Horizons	Under Served	-	6.5%	2.4%	16.6%	32.5%	56.6%	41.1%	20.0%	19.8%	18.7%	Small Cap
Carnelian	YnG Strategy	-	6.4%	6.0%	16.5%	-	-	-	-	-	22.9%	Multi Cap
Aequitas Investment	India Opportunities	1421.31	5.8%	3.1%	15.0%	23.5%	49.9%	34.1%	7.9%	-	29.7%	Small Cap
ICICI	Contra	1161.9	5.7%	8.5%	22.9%	21.4%	32.5%	24.7%	-		19.2%	Multi Cap
Green Lantern Capital LLP	Growth Fund	-	5.3%	6.5%	26.5%	24.0%	58.1%	40.9%	-	-	15.3%	Mid & Small
Abakkus	Emerging Opportunities	-	5.1%	5.1%	9.3%	1.6%	36.6%	-	-	-	37.6%	Mid & Small
Valentis	Rising Star Opportunity	-	4.7%	11.6%	17.1%	9.5%	52.9%	42.2%	16.3%	-	18.9%	Small Cap
Invesco	DAWN	270	4.4%	7.4%	17.2%	13.8%	27.4%	17.8%	10.0%	-	8.8%	Thematic

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	4.1%	5.6%	13.1%	10.5%	20.3%	15.9%	12.9%	12.3%	Large Cap
Nifty 500	3.4%	4.1%	12.9%	8.9%	22.0%	17.6%	11.7%	13.1%	Multi Cap
Nifty Mid Cap 100	1.9%	1.8%	13.3%	8.1%	27.5%	23.0%	10.0%	-	Mid Cap
Nifty Small Cap 100	3.0%	3.7%	8.3%	-6.4%	23.2%	19.7%	2.8%	-	Small Cap

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