



PMS AIF WORLD
High Performance Investing

FEBRUARY, 2024 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
FEBRUARY, 2024

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Budget 2024 Sets the Vision of Developed India by 2047



Kamal Manocha

Founder & CEO

Dear Investors,

India's budget has always been a topic of great interest and anticipation. This budget highlighted govt's commitment to inclusive development, good governance, and sustainable growth. It sets the vision, i.e. 'With a strong foundation and effective policies, India will become a developed nation by 2047'. Here are the key highlights of interim budget 2024.

7 Areas of Govt Focus:

1) Focus on Development: The government aims to make India a developed economy by 2047, focusing on the poor, women, youth, and farmers. Various assistance like Credit assistance to 78 lakh street vendors under scheme PM-SVANidhi has been granted.

2) Focus on Power Sector & Solar Energy: The government aims to promote solar energy by installing solar panels on rooftops and providing free power to households.

- 10 crore LPG connections released under PMUY
- 36.9 crore LED bulbs, 72.2 lakh LED Tube lights, and 23.6 lakh Energy efficient fans distributed under UJALA
- 1.3 crore LED Street Lights installed under SNLP

3) Focus on participative economic growth: The main focus of the government is that the people from all parts of country should actively participate in the economic growth. The government has successfully transferred benefits directly to people, eliminating middlemen and minimizing leakages.



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Budget 2024 Sets the Vision of Developed India by 2047

4) Special Focus on Women: The government has announced various measures to empower women, including health insurance for healthcare workers and financial support for self-help women groups.

- 30 crore Mudra Yojana loans disbursed to women entrepreneurs
- Increased female enrolment in higher education by 28% in 10 years
- 43% of female enrolment in STEM courses
- 1 crore women assisted by 83 lakh Self-Help Groups (SHGs)

5) Focus on Fiscal Prudence: The government aims to reduce the fiscal deficit and plans to raise funds through disinvestment

6) Focus Tackling Multi-dimensional Poverty: The government aims to tackle poverty beyond a monetary definition and focus on empowering the poor. Substantive development across all forms of infrastructure: Physical, Digital, and Social.

7) Focus on Affordable Housing: The government plans to provide interest-free loans to the youth and promote affordable housing for the middle class. Fostering entrepreneurial aspirations of Youth-43 crore loans sanctioned under PM Mudra Yojana scheme.

Important Numbers:

- For the fiscal year 2024-25, the government projects a 10.5% nominal GDP growth
- The Centre will borrow Rs 14.13 lakh crore from the markets in 2024-25 to finance its fiscal deficit
- The government allocated Rs 11.1 lakh crore as capital expenditure for the next fiscal year. This is a rise of 11.1%
- The FY25 capex at 3.4% of the GDP



Indices & Valuations as of 31st Jan 2024

DOMESTIC INDICES	
INDICES	1M Change*
SENSEX	- 0.68%
NIFTY 50	- 0.03%
NIFTY BANK	- 4.75%
NIFTY MIDCAP 100	+ 5.17%
NIFTY SMALLCAP 100	+ 5.83%

GLOBAL INDICES	
INDICES	1M Change*
DOW JONES	+ 1.22%
NASDAQ 100	+ 1.85%
S&P 500	+ 1.59%
SHANGAI COMPOSITE	- 6.27%
NIKKEI 225	+ 8.43%

*Data as of 31st Jan 2024

FII & DII ACTIVITY [^]	
FII (Equity)	- Rs 35,977.81 Cr
DII (Equity)	+ Rs 26,743.59 Cr

[^]Net Data, as per CM Provisional Data, 1M change as of 31st Jan 2024

PRICE-TO-EARNINGS (PE) RATIO	
NIFTY 50	22.7
NIFTY 500	24.5
NIFTY MIDCAP 100	26.1
NIFTY SMALLCAP 100	30.3

MARKET CAP to GDP RATIO [^]	~94%
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[^]Buffett Indicator as of 8th Feb 2024



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Concluding Remarks...

Building on its commitment to inclusive growth and governance, the interim budget showcased India's decade-long progress and its forward-looking vision, aiming for developed nation status by 2047. This ambition extends beyond mere numbers, highlighting India's strategic, diplomatic, and resilient economic manoeuvres.

As India cements its place in global economic discussions, its stock market triumphs signal its potential as a powerhouse and serve as an inspiration for emerging markets, underscoring its pivotal role in the global economic landscape.

Having said that, markets are fair to expensive right now, where Nifty 50 PE (on a trailing basis) stands at around 22, the Nifty Mid Cap 100 PE is around 26, and the Nifty Small Cap 100 PE is around 30.

We at PMS AIF WORLD declutter investors thoughts which are crowded with biases, and help them make good & informed investment decisions, with our in-depth knowledge and analytics. **We understand the gravity of investment decisions** and our mission is to ensure that our clients are equipped with the insights and guidance required to navigate any complexities, ensuring that our clients' time and money are invested wisely for optimal returns.

We hereby cordially invite you to JOIN us on 23rd & 24th Feb to be a part of India Biggest Alternative Investment Summit 2024. It is a virtual event that' is very thoughtfully planned for investors to discuss most realistic aspects that are important to we all continue to experience insightful & high-performance investing..

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Esteemed Speakers



Nilesh Shah

Managing Director,
Kotak Mahindra AMC



Bharat Shah

Executive Director,
ASK Group



Sunil Singhania

Founder,
Abakkus Asset
Managers



Anand Shah

Head – PMS & AIF
Investments,
ICICI Prudential AMC



Rajesh Kothari

Founder & MD,
AlfAccurate Advisors



Hitesh Zaveri

SVP & Head – Listed
Equity Alternatives,
Axis Alternates



Aakash Desai

Head of Private Credit,
360 ONE Asset



Gaurav Mehta

CIO, Alternatives -
Equity
SBI Funds Management
Limited



Nishad Khanolkar

President & Fund
Manager,
India Inflection
Opportunity Fund



Esteemed Speakers



Jaimin Gupta
Co-Founder,
Chanakya Fund



Jyotivardhan Jaipuria
Founder, Valentis
Advisors



Dhaval Patel
Fund Manager -
Alternatives,
Axis Alternates



Nimesh Mehta
Director & Head - Sales,
BD & Products,
ASK Investment
Managers



Manish Bhandari
Director and Principal
Officer,
Vallum Capital



Ashish Jagnani
Fund Manager,
Kotak Mahindra AMC



Govind Agrawal
Director,
AlfAccurate Advisors
Pvt. Ltd.



Sandip Bansal
Deputy CIO,
ASK Investment
Managers



EA Sundaram
Executive Director,
BugleRock Capital
Private Limited



Esteemed Speakers



Bhavin Shah
Founder,
Sameeksha Capital



Amit Jeswani
Founder,
Stallion Asset



Neil Bahal
Founder & Fund
Manager,
Negen Capital



Anunaya Kumar
President,
Sales & Distribution,
360 ONE Asset



Rajnish Garg
Partner & Fund
Manager,
INVasset



Vikas Khemani
Founder,
Carnelian Asset Advisors



Vineet Jain
CEO & Founder,
Volvin Limited



Sonam Srivastava
Founder,
Wright Research



Yash Ravel
CEO - Fund
Management,
Welspun One



Esteemed Speakers



Divam Sharma
CEO & Co-founder,
Green Portfolio



Chockalingam Narayanan
Senior Fund Manager,
PMS & AIF,
ICICI Pru AMC



Praveen Kumar
CIO,
AlphaGrep IM



Arun Subrahmanyam
Founder & Managing
Partner,
Ampersand Capital



Anirudh Garg
Partner & Fund
Manager,
INVasset



Ashish Ahluwalia
Director - Private Equity,
Axis Alternates



Abhisar Jain
Head and Fund
Manager,
Monarch AIF



Shekhar Daga
Head - Private Capital,
ICICI Prudential AMC



Kunal Pawaskar
Principal Officer
& Head - PMS,
Tata AMC



Raman Nagpal
Founder & CIO,
Alta Cura



6 years to \$6 trillion Indian Economy

 23rd Feb 2024

- 02:00 pm - 02:15 pm** ● **Aishwarya Singh**
Emcee
- 02:15 pm - 02:45 pm** ● **Bharat Shah**
What does the trinity of Higher, Durable, and Qualitative growth of Indian economy convey for the future of stock markets?
- 02:45 pm - 03:30 pm** ● **Chockalingam Narayanan | Divam Sharma | Hitesh Zaveri**
Are we heading towards a Bubble OR is this the beginning of a Mega Bull Run?
- 03:30 pm - 03:45 pm** ● **Ashish Ahluwalia**
Why and how to invest in Private Equity Alternatives
- 03:45 pm - 04:30 pm** ● **Akash Desai | Shekhar Daga | Dhaval Patel**
Does the private capex boom offer an opportunity for private credit funds to lend smartly for high double-digit returns?
- 04:30 pm - 05:15 pm** ● **Gaurav Mehta | Kunal Pawaskar | Ashish Jagnani**
Cyclicals vs Seculars: The bigger opportunity over next 3 years
- 05:15 pm - 06:15 pm** ● **Sunil Singhania | Nilesh Shah | Rajesh Kothari | Vikas Khemani**
How will the structure of India's top 500 companies likely transform as the country moves towards a \$6 trillion economy?
- 06:15 pm - 07:15 pm** ● **Nishad Khanolkar | Jaimin Gupta | Yash Ravel | Neil Bahal**
Alternative strategies to tap opportunities that could create un-paralleled wealth in the future
- 07:15 pm - 08:00 pm** ● **Praveen Kumar | Vineet Jain | Raman Nagpal**
Role of alternative investment strategies for better risk-adjusted returns in the future
- 08:00 pm - 08:15 pm** ● **Team PMS AIF World**

6 years to \$6 trillion Indian Economy

 24th Feb 2024

- 10:00 am - 10:15 am** ● **Aishwarya Singh**
Emcee
- 10:15 am - 11:00 am** ● **Amit Jeswani | Anirudh Garg | Sonam Srivastava**
If Quant can be unbiased, Human can be a Genius?
- 11:00 am - 11:45 am** ● **Manish Bhandari | Rajnish Garg | Arun Subrahmanyam**
How to identify fast growing and compounding businesses going ahead?
- 12:00 pm - 12:45 pm** ● **Bhavin Shah | Jyotivardhan Jaipuria | EA Sundaram**
How to steer portfolio towards sustained wealth creation in a landscape marked by high valuations?
- 12:45 pm - 01:00 pm** ● **Anand Shah**
Trend has changed
- 01:15 pm - 02:00 pm** ● **Anunaya Kumar | Nimesh Mehta**
As more investors embrace risk, how to make informed decisions and avoid the greed trap?
- 02:00 pm - 02:45 pm** ● **Sandip Bansal | Govind Agrawal | Abhisar Jain**
Why is the age-old flexicap among the most favored investment styles and how does it suit the present times?
- 02:45 pm - 03:30 pm** ● **Team IIM-A**
Awards
- 03:30 pm - 03:45 pm** ● **Team PMS AIF World**
Vote of Thanks

Top 10 Portfolios In Each Peer Group (Data as of 31st January 2024)

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
Nine Rivers	Aurum Small Cap Oppprtunities	730	2.48%	11.16%	21.84%	65.91%	27.68%	40.91%	29.65%	28.87%	29.89%	Small Cap	Sandeep Daga
AccuraCap	PicoPower	662.5	4.88%	18.77%	26.92%	55.78%	19.44%	31.63%	29.07%	25.55%	24.46%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	1272	-2.22%	8.13%	13.52%	53.13%	18.43%	33.47%	25.65%	20.10%	18.77%	Multi Cap	Sameer Shah
Girik Capital	Multicap Growth Equity Strategy	1221.9	3.15%	20.94%	27.96%	63.36%	19.43%	27.19%	24.08%	23.80%	21.24%	Multi Cap	Charandeep Singh
Motilal Oswal AMC	Value Migration	2095	3.59%	19.19%	29.21%	51.21%	20.71%	22.30%	19.06%	15.81%	20.03%	Multi Cap	Vaibhav Agrawal
AlfAccurate Advisors	IOP	2247	1.68%	15.45%	12.92%	33.90%	16.12%	22.07%	18.65%	20.64%	18.80%	Multi Cap	Rajesh Kothari
Alchemy Capital Management	High Growth Select Stock	3772	1.05%	16.13%	17.61%	43.32%	14.27%	24.06%	16.41%	19.79%	20.23%	Multi Cap	Hiren Ved
Sundaram Alternates	S.E.L.F	757	3.95%	17.59%	14.55%	35.75%	9.88%	21.50%	20.28%	19.51%	17.75%	Mid & Small	Madanagopal Ramu
360 ONE	Multicap	-	-0.26%	13.66%	11.12%	27.29%	10.68%	17.63%	18.03%	19.79%	22.69%	Multi Cap	Anup Maheshwari
Alchemy Capital Management	High Growth	957	6.91%	25.48%	24.40%	46.28%	16.89%	21.00%	12.35%	15.33%	20.59%	Multi Cap	Hiren Ved
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	3290	4.64%	23.36%	29.04%	59.60%	16.33%	27.56%	26.33%	27.93%	Mid & Small	Samit Vartak	
Green Lantern Capital LLP	Growth Fund	345.2	9.53%	30.34%	53.59%	106.46%	52.63%	63.93%	38.79%	25.26%	Mid & Small	Abhishek Bhardwaj	
Stallion Asset	Core Fund	1203	4.85%	20.36%	32.99%	74.39%	28.37%	28.75%	31.20%	28.83%	Multi Cap	Amit Jeswani	
Negen Capital	Special Situations Fund	797.94	5.44%	21.32%	38.88%	66.27%	26.42%	40.80%	33.74%	19.43%	Multi Cap	Neil Bahal	
Sameeksha Capital	Equity Fund	1163.3	3.40%	16.60%	26.40%	58.10%	26.10%	32.10%	33.30%	24.00%	Multi Cap	Bhavin Shah	
Samvitti Capital	Aggressive Growth	238.82	9.28%	25.56%	39.62%	79.52%	27.05%	29.52%	20.00%	15.85%	Multi Cap	Prabhakar Kudva	
Valentis Advisors	Rising Star Opportunity Fund	853.16	5.97%	18.21%	22.87%	49.63%	24.45%	42.20%	28.27%	21.92%	Small Cap	Jyotivardhan Jaipuria	
Green Portfolio	Special	295.05	5.29%	21.03%	25.22%	50.45%	21.70%	35.23%	27.16%	28.22%	Multi Cap	Divam Sharma	
ValueQuest	Platinum Scheme	974.61	-1.67%	7.55%	15.10%	55.32%	18.60%	36.95%	30.17%	20.81%	Multi Cap	Ravi Dharamshi	
Equirus	Long Horizon Fund	961.44	3.99%	9.92%	14.22%	52.56%	16.17%	27.31%	31.37%	24.80%	Multi Cap	Viraj 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 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 January 2024)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Invasset	Growth Fund	-	17.14%	39.07%	62.80%	132.99%	55.19%	50.14%	-	44.25%	Multi Cap	Anirudh Garg
Carnelian Capital	Shift	-	4.94%	19.33%	26.90%	74.61%	34.20%	44.31%	-	47.68%	Mid & Small	Manoj Bahety
Green Portfolio	Super 30	106.5	10.75%	18.45%	27.54%	61.05%	27.06%	58.88%	-	36.61%	Multi Cap	Divam Sharma
Electrum	Laureate Portfolio	-	2.15%	11.48%	25.98%	61.12%	30.27%	43.01%	-	42.94%	Mid & Small	Romil Jain
Roha Asset Managers	Emerging Champions	-	7.39%	17.91%	25.59%	69.25%	24.89%	44.75%	-	46.52%	Mid & Small	Dhiraj Sachdev
ICICI Prudential PMS	PIPE Strategy	4558.1	5.01%	19.38%	25.84%	63.71%	37.11%	42.37%	-	33.79%	Small Cap	Anand Shah
Ambit Global Private Client	Alpha Growth	-	6.68%	21.62%	29.99%	82.80%	29.69%	34.45%	-	34.18%	Mid & Small	Umesh Gipta
Abakkus Asset Manager	Emerging Opportunities	2772	0.55%	11.47%	14.20%	52.19%	21.42%	37.32%	-	39.52%	Mid & Small	Sunil Singhania
AlfAccurate Advisors	Budding Beasts	-	3.18%	15.70%	19.54%	52.68%	26.97%	33.25%	-	32.66%	Mid & Small	Rajesh Kothari
Vallum Capital Advisors	India Discovery Strategy	1386	4.42%	20.31%	25.10%	57.48%	24.48%	31.32%	-	33.64%	Mid & Small	Manish Bhandari
Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Samvitti Capital	Active Alpha Multicap	152.24	7.35%	20.50%	38.45%	102.40%	48.93%	-	-	43.20%	Multi Cap	Prabhakar Kudva
Carnelian Capital	YnG Strategy	-	11.00%	42.84%	48.75%	93.42%	0.50%	-	-	49.35%	Multi Cap	Manoj Bahety
Carnelian	Bespoke Strategy	-	8.35%	24.17%	25.55%	67.37%	32.50%	-	-	37.77%	Mid & Small	Manoj Bahety
Motilal Oswal AMC	Ethical PMS	58	5.07%	24.56%	24.69%	55.77%	20.19%	-	-	19.17%	Multi Cap	Vaibhav Agrawal
Incred PMS	Multicap Portfolio	-	1.48%	11.82%	12.34%	53.24%	21.10%	-	-	18.21%	Multi Cap	Aditya Sood
Incred PMS	Small Cap	-	1.19%	9.58%	9.89%	49.25%	23.43%	-	-	17.09%	Small Cap	Aditya Sood
Fractal Capital Investments	Wealth Builder	-	0.86%	12.98%	13.75%	41.95%	24.86%	-	-	22.35%	Multi Cap	Miten Lathia
Incred PMS	Healthcare Portfolio	-	2.34%	12.92%	22.16%	52.05%	19.89%	-	-	16.57%	Multi Cap	Aditya Sood
SBI	Aeon Alpha PMS	321	2.29%	10.45%	13.75%	42.77%	20.43%	-	-	19.74%	Multi Cap	Gaurav Mehta
Ambit Investment Advisors	TenX Portfolio	232.21	-2.92%	5.60%	8.93%	29.55%	13.53%	-	-	12.03%	Mid & Small	Siddharth Bothra

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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 January 2024)

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
BugleRock Capital (formerly o3 Securities)	Special Situations	-	11.07%	23.38%	31.38%	76.04%	-	-	-	63.80%	Small Cap	E.A. Sundaram
Green Portfolio	Impact ESG	4.16	10.50%	25.40%	37.80%	75.77%	-	-	-	44.95%	Thematic	Divam Sharma
Maximal Capital	Pathfinder Value Fund	-	2.52%	21.49%	29.47%	74.98%	-	-	-	52.30%	Multi Cap	Sarvesh Gupta
Bonanza	Aegis	12.2	8.82%	23.39%	27.17%	65.97%	-	-	-	39.33%	Multi Cap	Team Bonanza
Shree Rama Managers LLP	Shree Vriddhi Plan	37.49	5.37%	19.40%	19.26%	64.01%	-	-	-	33.88%	Multi Cap	Arindam Samanta
Shree Rama Managers LLP	Shree Lakshmi Plan	40.58	3.55%	15.22%	19.01%	54.99%	-	-	-	28.53%	Multi Cap	Arindam Samanta
Fractal Capital Investments	FCI LLP Opportunities	-	1.93%	14.93%	17.15%	44.23%	-	-	-	34.56%	Multi Cap	Miten Lathia
Profusion	MSPS	-	4.96%	14.62%	19.88%	34.23%	-	-	-	34.30%	Multi Cap	Satyan Wadhwa
Maximal Capital	Income Fund	-	8.71%	14.91%	20.29%	31.20%	-	-	-	24.19%	Debt	Sarvesh Gupta
ValueQuest	Poise Scheme	49.61	-0.94%	2.85%	9.24%	43.61%	-	-	-	20.81%	Multi Cap	Varun Goenka

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Prabhudas Liladher	Aqua Strategy	179.6	8.27%	30.57%	45.92%	-	-	-	-	57.16%	Multi Cap	Siddharth Vora
Valcreate	IME Digital Disruption	-	9.81%	15.94%	19.76%	-	-	-	-	50.57%	Thematic	Ashi Anand
Wryght Research & Capital	Wright Alpha Fund	13.16	15.20%	38.10%	-	-	-	-	-	48.80%	Multi Cap	Sonam Srivastava
Wryght Research & Capital	Wright Factor Fund	42.4	13.70%	35.20%	-	-	-	-	-	47.20%	Multi Cap	Sonam Srivastava
Valcreate	IME Concentrated Microtrends	-	4.83%	19.43%	18.09%	-	-	-	-	40.17%	Large & Mid	Ashi Anand
Valcreate	Growing India Strategy	-	1.87%	15.22%	16.26%	-	-	-	-	35.70%	Multi Cap	Rajesh Pherwani
Wryght Research & Capital	Wright Factor Fund - Hedged	16.7	11.30%	25.80%	-	-	-	-	-	28.90%	Multi Cap	Sonam Srivastava
Alchemy	Smart Alpha 250	-	5.16%	27.58%	-	-	-	-	-	28.80%	Multi Cap	Hiren Ved
Valcreate	Life Sciences	-	1.36%	14.64%	14.00%	-	-	-	-	22.15%	Multi Cap	Rajesh Pherwani
Eklavya Capital	Equity	-	1.12%	3.35%	4.08%	-	-	-	-	8.98%	Multi Cap	Abhishek Chauhan

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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 January 2024)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Master Trust	India Growth Strategy	531.03	4.02%	20.23%	23.24%	53.39%	21.47%	35.08%	28.26%	31.21%	27.90%	Mid & Small
Bonanza	Value	21.79	14.12%	35.75%	38.53%	73.77%	28.79%	31.92%	25.18%	22.86%	22.74%	Mid & Small
Right Horizons	Super Value	-	-0.41%	10.48%	12.40%	40.60%	18.29%	38.81%	27.93%	20.73%	18.00%	Mid & Small
Aditya Birla Capital	Select Sector Portfolio	305	1.88%	15.86%	22.28%	42.55%	21.69%	30.06%	22.96%	22.41%	16.71%	Mid & Small
ABANS	Growth & Momentum	-	-0.35%	12.23%	16.12%	41.68%	17.22%	24.77%	24.17%	22.93%	23.61%	Multi Cap
Kotak AMC	Small & Midcap	52	8.55%	23.18%	24.75%	43.64%	18.10%	30.19%	21.07%	22.14%	18.52%	Mid & Small
TATA Capital	Emerging Opportunities	-	-0.05%	13.12%	12.15%	38.96%	17.89%	21.23%	17.57%	17.83%	12.01%	Mid & Small
Asit C Mehta	Ace Multicap	75.46	16.16%	46.27%	59.96%	102.05%	51.61%	44.69%	30.54%	-	25.08%	Multi Cap
Estee Advisors	Long Alpha	-	9.82%	31.47%	44.34%	78.05%	29.51%	36.39%	32.86%	-	26.16%	Multi Cap
Green Lantern Capital	Alpha Fund	14.39	6.11%	29.06%	42.87%	79.71%	40.67%	41.47%	-	-	41.04%	Large 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.
- 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 31st January 2024)

Peer Group 8: Best as per January 2024 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Invasset	Growth Fund	-	17.14%	39.07%	62.80%	132.99%	55.19%	50.14%	-	-	44.25%	Multi Cap
Asit C Mehta	Ace Midcap	4.01	16.93%	47.21%	50.49%	91.74%	43.79%	43.15%	29.92%	-	22.29%	Mid & Small
Asit C Mehta	Ace Multicap	75.46	16.16%	46.27%	59.96%	102.05%	51.61%	44.69%	30.54%	-	25.08%	Multi Cap
Wryght Research & Capital	Wright Alpha Fund	13.16	15.20%	38.10%	-	-	-	-	-	-	48.80%	Multi Cap
Bonanza	Value	21.79	14.12%	35.75%	38.53%	73.77%	28.79%	31.92%	25.18%	22.86%	22.74%	Multi Cap
Wryght Research & Capital	Wright Factor Fund	42.4	13.70%	35.20%	-	-	-	-	-	-	47.20%	Multi Cap
Capitalmind	Adaptive Momentum	828	13.17%	40.89%	42.49%	66.26%	26.43%	35.06%	-	-	29.94%	Multi Cap
Asit C Mehta	Ace Regular Income	36.21	12.43%	33.32%	43.11%	80.40%	39.06%	32.90%	22.51%	-	20.31%	Multi Asset
Bonanza	Edge	29.36	12.33%	29.78%	41.26%	78.46%	38.00%	51.51%	36.15%	-	23.95%	Multi Cap
Green Portfolio	Dividend Yield	24.2	11.90%	32.91%	50.54%	92.46%	39.58%	47.73%	-	-	40.79%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	0.02%	14.00%	10.48%	24.35%	13.28%	18.20%	16.30%	14.94%
BSE 500 TRI	1.92%	17.88%	16.20%	33.42%	16.46%	21.83%	18.48%	16.80%

- 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 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.

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