



PMS AIF WORLD
High Performance Investing

FEBRUARY, 2023 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
FEBRUARY, 2023

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Keep The Faith

Dear Investors,

Anything and everything that's achieved in life, gets first created in the mind. And, then, faith drives its achievement. So, if one wants to really create wealth from investing, foremost is to believe that there are good investments that will perform well and the future is going to be bright. The faith needs to be persistent and strong, especially during times of darkness.



Kamal Manocha

CEO,
PMS AIF World

The issue is that most investors are unable to sail through dark periods with faith, and limitation of human mind wavering too much, leads to loss of conviction. This also happens because, wealth management industry is not designed to be fair; its comprised of competent sales people who are skilled at encashing this limitation of human mind. Rather than helping investors keep the conviction and hold on to temporary underperformers during tough times, it operates in a system built to always show case products that performed best in the recent past, and thus, most investors seldom experience real wealth creation.

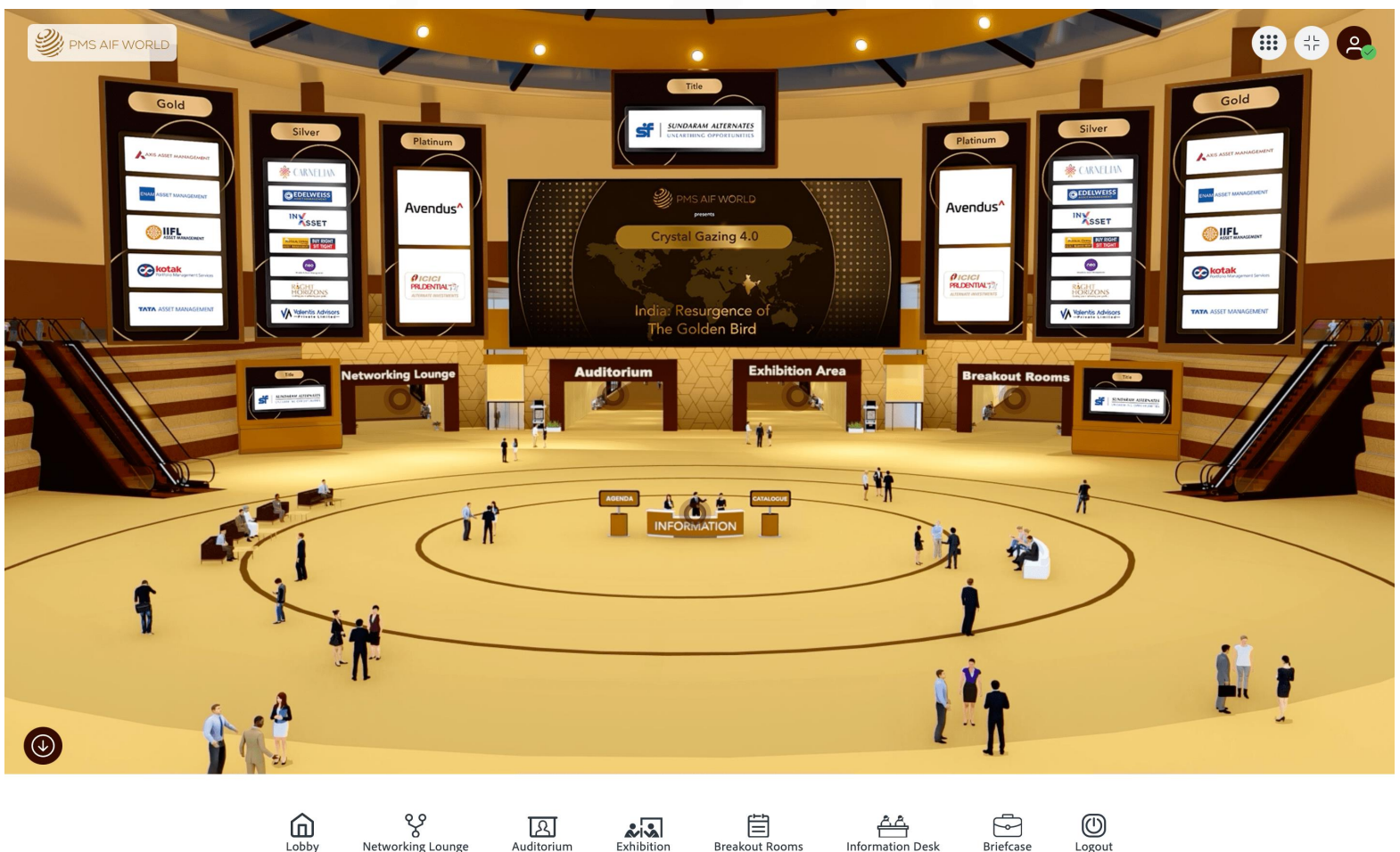
Year 2022 has been one such dark & turbulent year for the stock market and has left investors disappointed and confused. Now, in year 2023, it is the same state where investors are vulnerable to wavering and making weak investment decisions in the hands of some shrewd sales focused wealth managers, whose focus is to sell products which look more comfortable to the fearful & perplexed state of investor mind-set. Investors in this state need to be very careful. **This is exactly where knowledge plays a role of light cutting the darkness.**

PMS AIF WORLD has been set up with the mission of offering good investment products, selected objectively. And, we are working successfully towards our vision of creating thousands of real wealth creation stories. We are doing so, by ensuring investor conviction holds through the power of knowledge backed by content & analysis especially during tough phases.

Keep The Faith

This investment journal, [Investonomics](#) was released last week, it has been conceptualised to offer quarterly insights to our clients, and serves as a guide to help make informed investment decisions.

Since the world was hit by a pandemic soon after, subsequent years' summit was thoughtfully titled as "Wealth Creation in the Post Covid World" held virtually in Feb 2021 and thereafter in year 2022, this summit was titled, "Richer, Happier, Wiser Investors." The topic of Crystal Gazing Summit 4.0, this year was: **INDIA – Resurgence of the Golden Bird.**



This summit was attended by 1500+ viewers across investors, advisors and industry. The endeavour was to reinforce investor confidence.

We Thank You, for making this event a grand success.

Stay safe, stay invested!

Top 10 Portfolios In Each Peer Group (Data as of 31st January 2023)

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	871.44	-2.8%	-2.7%	-0.3%	-8.4%	21.0%	27.9%	10.4%	21.3%	22.0%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	749.85	0.1%	-2.8%	0.4%	-8.4%	24.6%	26.1%	9.9%	15.4%	16.4%	Multi Cap	Sameer Shah
Alfaccurate	IOP	1325.85	-2.5%	-4.3%	0.7%	0.7%	16.5%	16.4%	8.4%	17.9%	17.8%	Multi Cap	Rajesh Kothari
Sundaram	SELF	660	-5.9%	-8.4%	-5.1%	-11.1%	14.9%	15.2%	10.4%	17.6%	16.4%	Mid & Small	Madanagopal Ramu
Girik Capital	MultiCap	797.42	-4.4%	-6.0%	0.4%	-12.3%	12.5%	15.8%	6.8%	19.3%	18.5%	Multi Cap	Charandeep Singh
Sundaram	SISOP	1039	-4.2%	-6.3%	-1.8%	-6.8%	13.4%	13.4%	11.0%	14.2%	16.9%	Multi Cap	Madanagopal Ramu
Alchemy	High Growth Select Stock	2855	-5.5%	-9.5%	-7.1%	-8.9%	15.4%	10.2%	7.4%	16.0%	18.8%	Multi Cap	Hiren Ved
ASK	IEP	18414	-5.2%	-9.6%	-6.4%	-8.3%	9.9%	10.4%	10.8%	18.0%	16.8%	Multi Cap	Chetan Thacker
Quest	Flagship	653	-4.5%	-7.1%	-2.5%	-10.0%	9.9%	13.5%	5.4%	15.4%	15.5%	Multi Cap	Aniruddha Sarkar
Motilal	Value	1673	-1.7%	-4.2%	-0.5%	-3.6%	10.0%	7.8%	7.5%	11.2%	18.6%	Large Cap	Shrey Loonker

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	2370	0.1%	-5.6%	-5.3%	-15.2%	14.0%	19.6%	9.0%	25.3%	Mid & Small	Samit Vartak	
Valentis	Rising Star Opportunity	-	-0.7%	2.7%	13.4%	3.5%	38.6%	38.1%	11.7%	18.0%	Small Cap	Jyotivardhan Jaipuria	
UNIFI	Blended – Rangoli	-	-3.0%	-3.6%	1.6%	-2.9%	22.2%	31.2%	18.0%	20.6%	Mid & Small	Sarath K. Reddy	
Buoyant	Opportunities Multicap	657	1.1%	2.9%	9.3%	1.0%	30.9%	23.3%	11.4%	20.5%	Multi Cap	Sachin Khivasara	
Sameeksha Capital	India Equity Fund	612.37	0.4%	3.0%	8.3%	0.5%	20.8%	26.8%	17.9%	19.7%	Multi Cap	Bhavin Shah	
SBI	ESG Portfolio	-	-0.5%	-5.2%	0.8%	5.3%	25.5%	21.8%	14.6%	14.7%	Multi Cap	Gaurav Mehta	
ValueQuest	Platinum Scheme	330.20	-3.0%	-5.5%	-3.6%	-9.4%	28.6%	28.8%	16.5%	17.3%	Multi Cap	Ravi Dharamshi	
Negen Capital	Special Situations	463.31	-2.8%	-6.5%	-2.2%	-3.9%	29.5%	31.0%	10.1%	12.4%	Multi Cap	Neil Bahal	
Ambit	Emerging Giants	257.77	-0.6%	-3.0%	7.7%	3.3%	19.5%	23.6%	14.9%	15.1%	Small Cap	Aishvarya Dadheech	
2Point2 Capital	Long Term value Fund	718	-1.7%	0.3%	8.5%	8.6%	17.7%	14.0%	13.7%	17.7%	Multi Cap	Amit Mantri	

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- 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 2023)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
ICICI	PIPE	1022.7	-0.7%	2.3%	8.8%	14.8%	32.7%	26.6%	-	26.1%	Small Cap	Anand Shah
Sage One	Small Cap	950	-2.2%	-4.3%	-2.4%	-10.3%	23.9%	32.6%	-	27.9%	Small Cap	Samit Vartak
Green	Special	183.03	-4.0%	-4.8%	-1.0%	-1.6%	28.2%	26.2%	-	23.8%	Multi Cap	Divam Sharma
Wize Market Analytics	Capital Mind-Momentum	485.96	-2.9%	-4.4%	3.4%	-3.9%	21.8%	26.1%	-	22.5%	Multi Cap	Anoop Vijaykumar
ICICI	Contra	1219.9	-2.0%	3.4%	14.1%	11.7%	25.8%	23.3%	-	17.8%	Multi Cap	Anand Shah
Valentis	Multi Cap	-	-0.9%	0.6%	7.6%	0.9%	21.3%	15.8%	-	20.1%	Multi Cap	Jyotivardhan Jaipuria
Marcellus	Little Champs	882	-1.7%	-7.4%	-6.8%	-9.4%	13.6%	19.8%	-	23.4%	Small Cap	Ashvin Shetty
Turtle Wealth	Wealth Mantra	-	0.3%	-1.2%	14.2%	9.4%	22.0%	14.9%	-	16.0%	Multi Cap	Rohan Mehta
Stallion	Core Fund	559.25	-4.4%	-8.2%	-1.3%	-5.6%	10.6%	18.0%	-	20.0%	Multi Cap	Amit Jeswani
TATA	ACT	113	-2.0%	-2.7%	2.9%	2.2%	14.1%	14.2%	-	12.3%	Multi Cap	Kunal Pawaskar

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Electrum	Laureate Portfolio	-	-2.6%	-3.4%	4.1%	5.3%	34.9%	-	-	35.5%	Mid & Small	Romil Jain
Carnelian	Shift Strategy	-	-0.5%	-0.2%	7.1%	4.2%	31.9%	-	-	38.0%	Multi Cap	Manoj Bahety
Green Lantern	Alpha Fund	-	-2.8%	-0.5%	5.5%	10.1%	25.5%	-	-	30.0%	Multi Cap	Abhishek Bhardwaj
Roha	Emerging Champions	266.13	-1.7%	-0.5%	4.0%	-7.9%	33.8%	-	-	37.7%	Mid & Small	Dhiraj Sachdeva
Abakkus	Emerging Opportunities	-	0.7%	5.2%	7.5%	-3.2%	30.4%	-	-	34.6%	Mid & Small	Sunil Singhanian
Abakkus	All Cap Approach	-	0.0%	2.6%	9.2%	-0.7%	28.1%	-	-	32.2%	Multi Cap	Sunil Singhanian
Turtle Wealth	Growth Mantra	-	-3.7%	-6.7%	4.9%	1.8%	24.9%	-	-	25.0%	Mid & Small	Rohan Mehta
First Global	India Super 50	-	-2.4%	-3.1%	1.8%	-6.0%	19.8%	-	-	23.6%	Multi Cap	Devina Mehra
Alchemy	Ascent	395	-1.5%	-4.5%	1.4%	-11.6%	19.7%	-	-	13.9%	Multi Cap	Hiren Ved
Motilal	Focused Mid Cap	289	-1.2%	-5.9%	-4.6%	-18.8%	7.3%	-	-	18.5%	Mid & Small	Rakesh Taraway

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➢ 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.

Top 10 Portfolios In Each Peer Group (Data as of 31st January 2023)

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Carnelian	YnG Strategy	-	1.3%	3.7%	9.2%	16.0%	-	-	-	15.7%	Multi Cap	Manoj Bahety
Fractal Capital	Wealth Builder	15.63	-0.2%	7.8%	15.7%	9.8%	-	-	-	13.1%	Multi Cap	Miten Lathia
IIFL	Phoenix	-	-2.2%	-2.0%	4.0%	4.1%	-	-	-	16.0%	Multi Cap	Anup Maheshwari
UNIFI	BCAD2	-	-2.8%	-4.7%	4.2%	9.7%	-	-	-	7.5%	Mid Cap	Aejas Lakhani
Profusion Investment	Income Enhancer	-	1.1%	2.5%	4.6%	6.4%	-	-	-	9.3%	Multi Cap	Satyan Wadhwa
Helios	India Rising	699.48	-6.2%	-7.2%	-2.1%	-6.3%	-	-	-	20.1%	Multi Cap	Dinshaw Irani
White Whale LLP	North Star Portfolio	-	-5.7%	-8.4%	-2.4%	-0.4%	-	-	-	12.3%	Multi Cap	Hardik Doshi
Magadh Capital	Future Stars	-	-4.7%	-2.4%	4.3%	-3.5%	-	-	-	1.8%	Mid & Small	Vipul Prasad
White Oak	India Business Leaders	330	-3.2%	-5.9%	-0.1%	-5.6%	-	-	-	8.0%	Multi Cap	Team White Oak
Magadh Capital	Value For Growth	-	-3.9%	-3.6%	4.6%	-1.9%	-	-	-	-1.3%	Multi Cap	Vipul Prasad

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Shree Rama Managers LLP	Shree Wealth Builder Plan	10.14	0.5%	-0.7%	-0.3%	-	-	-	-	-2.1%	Multi Asset	Arindam Samanta
Emkay	ENVI	-	-0.8%	-0.9%	3.1%	-	-	-	-	16.7%	Flexi Cap	Sachin Shah
Green	Impact ESG	-	-1.2%	-0.3%	6.4%	-	-	-	-	15.8%	Thematic	Divam Sharma
Equirus	Core Equity	21.58	-2.1%	-2.6%	7.0%	-	-	-	-	10.4%	Multi Cap	Viraj Mehta
Shree Rama Managers LLP	Shree Vriddhi Plan	9.29	-3.4%	-11.6%	2.2%	-	-	-	-	1.9%	Multi Cap	Arindam Samanta
Shree Rama Managers LLP	Shree Lakshmi Plan	12.51	-4.8%	-5.7%	0.1%	-	-	-	-	0.2%	Multi Cap	Arindam Samanta
White Oak	India Digital Leaders	132	-4.8%	-10.0%	-8.3%	-	-	-	-	-23.1%	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 31st January 2023)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Right Horizons	Under Served	-	-3.8%	-1.6%	0.8%	13.5%	45.0%	34.5%	16.7%	19.2%	17.7%	Small Cap
Master Portfolio	MPSL-Vallum India Discovery	468.4	-1.9%	-2.3%	2.5%	-3.8%	26.6%	27.8%	11.3%	27.4%	25.9%	Mid Cap
Care	Growth Plus Value	522	-2.3%	-2.8%	1.2%	-2.3%	32.4%	30.4%	5.1%	22.4%	20.4%	Mid & Small
Narnolia	Multicap	340	-3.1%	-3.5%	-0.9%	-7.1%	15.1%	19.1%	12.6%	18.5%	18.9%	Multicap
Sundaram	Voyager	264	-5.8%	-7.9%	-4.2%	-11.4%	13.6%	14.8%	11.5%	19.7%	18.8%	Multi Cap
Sundaram	Rising Stars	80	-2.1%	-6.7%	2.8%	-2.1%	24.1%	17.2%	5.3%	17.3%	14.3%	Small Cap
Green Lantern	Growth Fund	-	-2.0%	0.2%	8.2%	12.8%	46.0%	37.4%	15.4%	-	13.7%	Multi Cap
Invasset	Growth Fund	56.18	-1.2%	-4.2%	0.7%	3.3%	20.5%	22.7%	-	-	23.4%	Multi Cap
KRIIS	Multi Cap Advantage	93	-5.1%	-11.1%	-14.5%	-17.9%	18.6%	20.3%	-	-	26.8%	Multi Cap
ICICI	Value	87.9	-1.9%	6.8%	18.2%	15.4%	26.5%	19.5%	-	-	16.9%	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.
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Top 10 Portfolios In Each Peer Group (Data as of 31st January 2023)

Peer Group 8: Best as per January 2023 Performance

Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Carnelian	YnG Strategy	-	1.3%	3.7%	9.2%	16.0%	-	-	-	-	15.7%	Multi Cap
Buoyant	Opportunities Multicap	657	1.1%	2.9%	9.3%	1.0%	30.9%	23.3%	11.4%	-	20.5%	Multi Cap
Profusion Investment	Income Enhancer Fund	-	1.1%	2.5%	4.6%	6.4%	-	-	-	-	9.3%	Debt
Edelweiss	Focused Mid & Small Cap	79	0.8%	-5.1%	-1.8%	-9.7%	21.3%	20.3%	5.8%	-	8.8%	Small & Mid
Abakkus	Emerging Opportunities	-	0.7%	5.2%	7.5%	-3.2%	30.4%	-	-	-	34.6%	Mid & Small
Estee	I-Alpha	270.92	0.7%	2.5%	4.2%	7.9%	7.2%	8.2%	9.1%	10.9%	12.0%	Arbitrage
Motilal	BOP	1166	0.7%	-1.9%	6.4%	2.6%	11.1%	11.7%	10.0%	-	9.8%	Multi Cap
Shree Rama Managers LLP	Shree Wealth Builder Plan	10.14	0.5%	-0.7%	-0.3%	-	-	-	-	-	-2.1%	Multi Asset
Asit C Mehta	Ace Payout	-	0.5%	6.8%	12.1%	7.2%	14.1%	14.8%	-	-	9.6%	Multi Asset
Sameeksha Capital	India Equity Fund	612.37	0.4%	3.0%	8.3%	0.5%	20.8%	26.8%	17.9%	-	19.7%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	-2.4%	-1.9%	2.9%	1.9%	13.8%	13.9%	9.9%	11.3%	Large Cap
Nifty 500	-3.3%	-3.2%	1.8%	0.1%	15.0%	14.8%	9.0%	12.0%	Multi Cap
Nifty Mid Cap 100	-2.6%	-2.4%	3.5%	1.3%	21.1%	19.4%	8.1%	13.9%	Mid Cap
Nifty Small Cap 100	-2.4%	-1.9%	3.6%	-14.5%	15.0%	15.1%	1.5%	10.1%	Small Cap

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