



**PMS AIF WORLD**  
High Performance Investing

**JANUARY, 2023 NEWSLETTER**

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

**MONTH**  
JANUARY, 2023

**PREPARED BY**  
PMS AIF WORLD

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**MONTHLY PERFORMANCE REPORT**

# 2022: The year of resets



**Kamal Manocha**

CEO,  
PMS AIF World

Dear Investors,

Wishing you a very Happy New Year!

2022 started with the change of Dovish stance of Quantitative Easing to Hawkish stance of Quantitative Tightening. Since March 2022, the Fed has raised rates 7 times, totalling 425 basis points. On the other hand, since the tightening cycle began in April 2022, the RBI has increased rates a total of 225 basis points.

In 2022, global inflation rose at the fastest rate, and NASDAQ stocks fell at the fastest rate. NASDAQ was down by around 34%, as of Dec 30, 2022, and all US FAANG stocks suffered losses, dropping between 30% and 65%. However, the Nifty and Sensex both increased by around 3%, as of Dec 30, 2022.

India stands out as an anomaly with a strong economy that has turned out to be one of the best performing economies. India is now seen as an economy to look forward to in the next years on a global scale. The Manufacturing Purchasing Managers Index (PMI) for India came up at 57.8 in December 2022, which was far higher than forecasted and up significantly from the reading of 55.7 in November.

Throughout the year, a large number of listed Indian companies increased shareholder value significantly. The combined market capitalization of companies like Reliance, Tata, and Adani has significantly increased, increasing the nation's total market capitalization. Markets were kept afloat by a sizable domestic money inflow (both institutional and retail), which counteracted outflows from foreign institutional investors (FIIs). It seems likely that DIIs and individual investors will continue to dominate the market, with FII inflow picking up steam in 2023.

Even though the IPO market was marginally slower than that of 2021, according to BSE data, 90 IPOs got listed on the market in 2022. Of them, 52 IPOs for the SME segment and 38 for the main board were launched. One of the largest listings in India this year – the LIC IPO, raised more than Rs 20,000 crore.

## 2022: The year of resets

With the number of deals seeing a 3% increase in volume, India was one of the brighter spots in what was a disappointing year for IPOs globally, according to the EY Global IPO Trends 2022 report. With significant regulatory changes expected to take effect in 2023, more robust IPO activity and governance will be supported.

Indian markets were remarkably resilient to exogenous shocks. This resiliency, which is apparent despite a lacklustre performance on the export front, is an indication of strength in the domestic economy. Investors should have ideally rushed to sell, given the conflict between two nations or a pandemic spreading in China, a significant economy. However, nothing of the sort occurred. Although historically financial markets have not been adversely affected by war, this time around's conflict between Russia and Ukraine meant that vital raw materials for food and energy were affected. Particularly in Europe, natural gas prices surged, causing a structural shift in the business. Russian retaliation and sanctions by NATO nations only made matters more complicated.

Crude Oil experienced a similar situation - Although the oil cartel continued to restrict supplies, oil prices remained low due to weakening demand from China and other nations going through a recession.

Gold continues to serve as a safe haven even as financial markets became more shaky. In addition to investors, the central bank ran to the gold market this time for safety. The largest purchasers of the yellow metal were central banks from India, China, and Russia.

Asset allocation based on your risk profile and macro indicators is the way to go. For your long-term wealth growth, stick to equities; and invest your short-term funds in fixed income.

Although monetary policy will continue to be important, 2023 may bring some unexpected developments. Our sincere endeavours will be keeping a close eye on micro & macroeconomic developments and bringing you our own blend of content & analysis to help you make informed decisions in your investing journey. On that note, we look forward to 2023 with belief and conviction. Here's wishing you a happy & a prosperous new year!

Stay safe, stay invested!





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## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> December 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	906.82	-1.8%	-1.0%	10.3%	-10.4%	23.3%	32.9%	10.2%	21.6%	22.5%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	745.11	-1.8%	-2.8%	8.1%	-5.0%	24.3%	29.1%	9.5%	16.4%	16.5%	Multi Cap	Sameer Shah
Sundaram	SELF	698	-2.0%	-3.2%	10.9%	-6.8%	16.8%	21.5%	11.0%	18.1%	17.1%	Mid & Small	Madanagopal Ramu
Alfaccurate	IOP	1343.28	-3.7%	0.7%	14.3%	0.8%	17.1%	19.1%	8.4%	18.1%	18.1%	Multi Cap	Rajesh Kothari
Girik Capital	MultiCap	832.68	-2.9%	-1.8%	10.3%	-8.1%	14.7%	18.8%	6.4%	19.8%	19.0%	Multi Cap	Charandeep Singh
Alchemy	High Growth Select Stock	3179	-4.1%	-4.5%	8.3%	-4.8%	18.3%	12.8%	8.3%	16.2%	19.4%	Multi Cap	Hiren Ved
Sundaram	SISOP	1074	-2.3%	-1.2%	12.1%	-6.9%	12.6%	16.7%	11.9%	14.6%	17.4%	Multi Cap	Madanagopal Ramu
ASK	IEP	19443	-4.1%	-4.3%	11.3%	-8.5%	10.6%	13.8%	11.0%	18.5%	17.4%	Multi Cap	Chetan Thacker
Quest	Flagship	713	-4.8%	0.2%	12.5%	-6.5%	13.1%	16.5%	5.9%	15.5%	15.9%	Multi Cap	Aniruddha Sarkar
Kotak	India Focus-Series I	395	-3.1%	0.7%	11.1%	-3.0%	23.4%	15.6%	1.6%	12.7%	13.2%	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 <sup>^</sup>	Core	2280	-4.9%	-5.1%	2.6%	-18.7%	13.5%	21.2%	9.5%	25.5%	Mid & Small	Samit Vartak	
Valentis	Rising Star Opportunity	-	-1.3%	8.5%	20.4%	7.4%	45.3%	41.2%	14.0%	18.4%	Small Cap	Jyotivardhan Jaipuria	
ValueQuest	Platinum Scheme	347.63	-3.3%	-1.1%	7.9%	2.4%	30.2%	34.0%	17.1%	17.9%	Multi Cap	Ravi Dharamshi	
Avestha	Growth	438	-2.2%	1.3%	18.8%	13.9%	31.9%	25.4%	14.9%	15.3%	Multi Cap	Farokh Pandole	
Nine Rivers	Aurum Small Cap Opp	267	-4.1%	-1.4%	13.5%	-0.6%	28.8%	35.2%	9.8%	27.2%	Small Cap	Sandeep Daga	
UNIFI	Blended - Rangoli	-	-1.6%	2.1%	13.7%	-0.2%	24.0%	36.4%	18.2%	21.6%	Mid & Small	Sarath K. Reddy	
Negen Capital	Special Situations	465.67	-3.1%	-4.2%	9.7%	-1.1%	34.4%	36.0%	11.2%	13.2%	Multi Cap	Neil Bahal	
Buoyant	Opportunities Multicap	634	-1.6%	5.5%	19.7%	3.1%	32.0%	24.8%	10.7%	20.6%	Multi Cap	Sachin Khivasara	
SBI	ESG Portfolio	-	-4.6%	-3.1%	11.3%	6.3%	26.5%	24.3%	14.0%	15.0%	Multi Cap	Gaurav Mehta	
Sameeksha	Equity	606.8	-1.2%	5.6%	15.4%	-2.0%	20.5%	28.2%	17.9%	19.9%	Multi Cap	Bhavin Shah	

• 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<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> December 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
ICICI	PIPE	1003.1	0.1%	4.2%	21.4%	20.3%	33.9%	29.3%	-	27.1%	Small Cap	Anand Shah
ICICI	Contra	1221	-0.1%	11.1%	31.2%	20.0%	27.8%	24.3%	-	18.7%	Multi Cap	Anand Shah
Green	Special	188.67	-1.1%	-3.2%	13.8%	4.1%	29.0%	31.0%	-	25.4%	Multi Cap	Divam Sharma
Sage One	Small Cap	910	-4.4%	-2.4%	11.6%	-9.6%	28.0%	38.3%	-	29.3%	Small Cap	Samit Vartak
Wize Market Analytics	Capital Mind-Momentum	503.61	-3.9%	1.0%	11.3%	-4.2%	22.7%	29.0%	-	24.0%	Multi Cap	Anoop Vijaykumar
Valentis	Multi Cap	-	-2.1%	5.3%	15.4%	4.2%	21.0%	17.7%	-	20.9%	Multi Cap	Jyotivardhan Jaipuria
Turtle Wealth	Wealth Mantra	250	-3.0%	3.5%	25.3%	9.0%	19.7%	16.7%	-	16.3%	Multi Cap	Rohan Mehta
Aditya Birla	India Special Opportunity	535	-3.0%	2.6%	14.4%	5.7%	20.1%	19.8%	-	15.3%	Multi Cap	Sameer Narayan
Stallion	Core Fund	599.44	-2.3%	-1.7%	15.5%	-10.3%	12.0%	20.9%	-	21.8%	Multi Cap	Amit Jeswani
TATA	ACT	118	-2.0%	0.2%	16.0%	2.2%	15.1%	16.0%	-	13.2%	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	-	-4.2%	0.4%	16.3%	5.6%	36.9%	-	-	38.9%	Mid & Small	Romil Jain
Roha	Emerging Champions	266.13	-0.9%	2.8%	13.9%	-2.1%	36.8%	-	-	40.5%	Mid & Small	Dhiraj Sachdeva
Carnelian	Shift Strategy	-	-3.9%	2.1%	15.8%	-3.3%	31.7%	-	-	40.0%	Multi Cap	Manoj Bahety
Abakkus	Emerging Opportunities	-	-0.5%	8.2%	17.7%	-4.5%	31.4%	-	-	35.7%	Mid & Small	Sunil Singhania
Abakkus	All Cap Approach	-	-0.2%	8.6%	18.3%	-1.3%	30.1%	-	-	33.6%	Multi Cap	Sunil Singhania
Turtle Wealth	Growth Mantra	100	-5.5%	-2.4%	17.9%	3.3%	25.7%	-	-	28.3%	Multi Cap	Rohan Mehta
First Global	India Super 50	-	-3.6%	2.2%	12.1%	-5.8%	21.1%	-	-	25.5%	Multi Cap	Devina Mehra
Invasset	Growth	58.37	-6.5%	-6.2%	13.3%	-3.2%	19.3%	-	-	24.6%	Multi Cap	Anirudh Garg
Helios	India Rising	734.88	-2.3%	0.8%	14.8%	-3.8%	13.3%	-	-	23.5%	Multi Cap	Dinshaw Irani
Motilal	Focused Mid Cap	298.0	-4.0%	-1.5%	3.4%	-21.4%	8.7%	-	-	19.5%	Mid & Small	Rakesh Taraway

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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> December 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
Oaks AMC	ABC	-	-0.5%	8.6%	20.5%	15.9%			-	21.9%	Multi Cap	Debashish Bose
Pace 360	Tresor Flexi	40.2	-0.1%	6.7%	9.2%	15.3%	-	-	-	24.0%	Multi Asset	Amit Goel
Alfaccurate	Budding Beasts	-	-1.5%	-0.7%	17.7%	4.7%	-	-	-	25.5%	Mid & Small	Rajesh Kothari
White Whale LLP	North Star Portfolio	-	-3.6%	-2.0%	17.5%	-0.7%	-	-	-	15.9%	Multi Cap	Hardik Doshi
Pace 360	Tresor Sustainer		-1.6%	4.7%	6.1%	9.1%	-	-	-	17.4%	Multi Asset	Amit Goel
Pace 360	Tresor Secure	14.18	0.5%	3.8%	3.8%	7.9%	-	-	-	12.9%	Multi Asset	Amit Goel
Profusion Investment	Income Enhancer Fund	-	0.8%	3.0%	3.9%	5.7%	-	-	-	9.0%	Debt	Satyan Wadhwa
LIC MF	Factor Advantage	-	-2.8%	2.8%	14.3%	-1.2%	-	-	-	4.8%	Large Cap	Azeem Ahmad
White OAK	India Business Leaders	345	-3.3%	-0.1%	13.7%	-6.1%	-	-	-	10.3%	Multi Cap	Team White Oak
Ambit	TenX	109.86	-2.8%	-4.1%	15.6%	0.4%	-	-	-	0.5%	Mid & Small	Aishvarya Dadheech

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Green	Impact ESG	-	-1.4%	1.1%	16.9%	-	-	-	-	19.6%	Thematic	Divam Sharma
Emkay	ENVI	-	-0.7%	4.2%	14.0%					17.6%	Flexi Cap	Sachin Shah
Carnelian	YnG Strategy	-	-3.8%	6.4%	15.6%					15.6%	Multi Cap	Manoj Bahety
Equirus	Core Equity	20.29	-1.9%	3.4%	15.8%	-	-	-	-	12.7%	Multi Cap	Viraj Mehta
Pace 360	Tresor Prive 1	3.27	-0.4%	6.9%	11.2%	-	-	-	-	10.3%	Multi Asset	Amit Goel
Pace 360	Tresor Prive	5.45	0.0%	5.3%	9.0%	-	-	-	-	9.0%	Multi Asset	Amit Goel
Shree Rama Managers LLP	Shree Vriddhi Plan	8.54	-5.1%	-6.2%	11.5%	-	-	-	-	5.5%	Multi Cap	Arindam Samanta
Shree Rama Managers LLP	Shree Lakshmi Plan	11.49	-2.4%	1.1%	8.4%	-	-	-	-	5.3%	Multi Cap	Arindam Samanta
Shree Rama Managers LLP	Shree Wealth Builder Plan	9.16	-2.8%	1.1%	7.3%	-	-	-	-	-2.6%	Multi Asset	Arindam Samanta
White OAK	Digital Leaders	138	-4.5%	-4.5%	8.1%	-	-	-	-	-20.8%	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> December 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	-	-3.9%	4.0%	12.7%	17.9%	50.5%	38.8%	17.8%	19.1%	18.2%	Small Cap
Care	Growth Plus Value	534	-0.6%	2.0%	9.9%	3.0%	34.3%	32.3%	4.7%	22.1%	20.8%	Mid & Small
Narnolia	Multicap	345	-3.1%	2.6%	10.7%	-2.8%	16.9%	21.3%	13.7%	18.8%	19.4%	Multicap
Kotak	Small & Mid cap	32	-3.0%	1.8%	10.9%	-3.7%	23.9%	26.1%	6.9%	15.4%	16.5%	Mid & Small
Sundaram	Voyager	281	-2.6%	-1.6%	11.4%	-7.0%	15.0%	20.6%	12.2%	20.1%	19.6%	Multi Cap
Right Horizons	Flexi Cap	173.9	-3.5%	1.3%	16.3%	-2.5%	22.8%	23.1%	11.7%	14.6%	13.0%	Multi Cap
Sundaram	Rising Stars	82	-2.8%	-4.8%	14.6%	-0.2%	24.3%	20.6%	4.8%	16.9%	14.5%	Small Cap
Green	Super 30	22.12	3.8%	11.6%	25.0%	6.5%	55.5%	34.3%	-	-	31.0%	Multi Cap
KRIIS	Multi Cap Advantage	93	-5.2%	-7.5%	-0.2%	-13.5%	24.6%	25.7%	-	-	29.4%	Multi Cap
Estee	Long Alpha	23.92	-2.4%	0.8%	15.4%	-5.1%	21.4%	28.5%	-	-	18.0%	Multi Cap

- ❑ 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> December 2022)

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

Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Green	Super 30	22.12	3.8%	11.6%	25.0%	6.5%	55.5%	34.3%	-	-	31.0%	Multi Cap
ICICI	Value	93.4	2.0%	13.6%	37.8%	24.5%	26.5%	21.9%	11.6%		17.3%	Multi Cap
Estee	I-Alpha	287.07	0.8%	2.9%	4.3%	7.8%	7.4%	8.4%	9.3%	11.0%	11.9%	Arbitrage
Profusion Investment	Income Enhancer Fund	-	0.8%	3.0%	3.9%	5.7%	-	-	-	-	9.0%	Debt
Pace 360	Tresor Secure	<b>14.18</b>	0.5%	3.8%	3.8%	7.9%	-	-	-	-	12.9%	Multi Asset
ITUS Capital	Fundamental Value Fund	810.3	0.1%	5.2%	13.0%	<b>-2.8%</b>	12.1%	20.8%	13.9%	-	19.9%	Multi Cap
ICICI	PIPE	1003.1	0.1%	4.2%	21.4%	20.3%	33.9%	29.3%	-	-	27.1%	Small Cap
Pace 360	Tresor Prive	<b>5.45</b>	0.0%	5.3%	9.0%	-	-	-	-	-	9.0%	Multi Asset
Pace 360	Tresor Flexi	<b>40.2</b>	<b>-0.1%</b>	6.7%	9.2%	15.3%	-	-	-	-	24.0%	Multi Asset
ICICI	Contra	1221	<b>-0.1%</b>	11.1%	31.2%	20.0%	27.8%	24.3%	-		18.7%	Small Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	<b>-3.5%</b>	5.9%	14.7%	4.3%	13.8%	14.2%	11.5%	11.9%	Large Cap
Nifty 500	<b>-3.1%</b>	4.2%	15.4%	3.0%	15.8%	16.1%	10.2%	10.3%	Multi Cap
Nifty Mid Cap 100	<b>-1.7%</b>	2.7%	19.1%	3.5%	23.0%	22.6%	8.3%	-	Mid Cap
Nifty Small Cap 100	<b>-2.5%</b>	3.1%	15.2%	<b>-13.8%</b>	17.2%	18.6%	1.4%	-	Small Cap

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2ND MAIN, 4TH CROSS  
BENGALURU - 560064

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