PMS AIF WORLD

July, 2026 PMS Newsletter

Performance & Alpha Report

A thoughtful view of Performance.

Monthly Performance Report

SMID Caps Showing Resilience Amidst Volatility

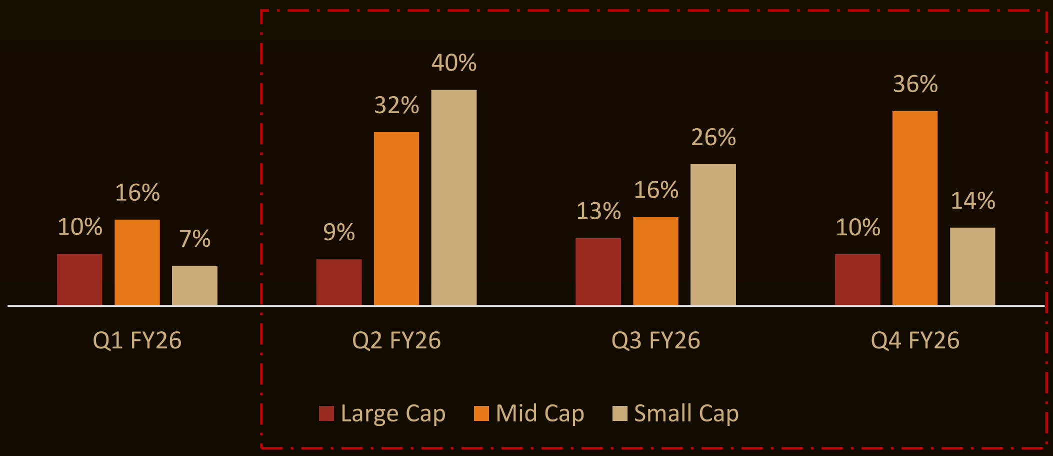
Over the past one year , the Indian markets have witnessed heightened volatility on the back of tariff wars, geopolitical tensions and the west Asia crisis. The repercussions of these events have been witnessed across global markets. While market sentiment has been impacted and price performance has undergone sharp swings from external influencing factors, the underlying macroeconomic foundation for Indian equities has remained broadly constructive.

Earnings outperformance by the SMID segment

The Q1FY26 struggled with earnings growth due to the US tariffs and uncertainty around it. The Small-cap index especially had faced deeper cuts due to the West Asia war, however a number of companies progressed from phases of balance sheet repair to stages of profitable growth, resulting in improved capital efficiency reflecting in the earnings.

Overall, we have witnessed earnings improvement in the Small and Mid-cap (SMID) segment from Q2FY26 onwards as companies with relatively stronger execution, pricing power, niche leadership, or balance-sheet strength have continued to deliver.

Market -cap wise PAT growth YoY %



SMID Caps Showing Resilience Amidst Volatility

A Valuation Reset

On the markets front, the Indian markets faced the issue of valuation premium especially in the SMID segment. This segment's valuation is still relatively higher compared to its long-term average, however, the market corrections since the last calendar year have led to moderation in valuations.

One needs to distinguish between companies where valuations have corrected meaningfully and those where expectations remain stretched. Valuation comfort is improving in pockets, but discipline remains important.

Exhibit 2: Valuation Moderation in Select Pockets

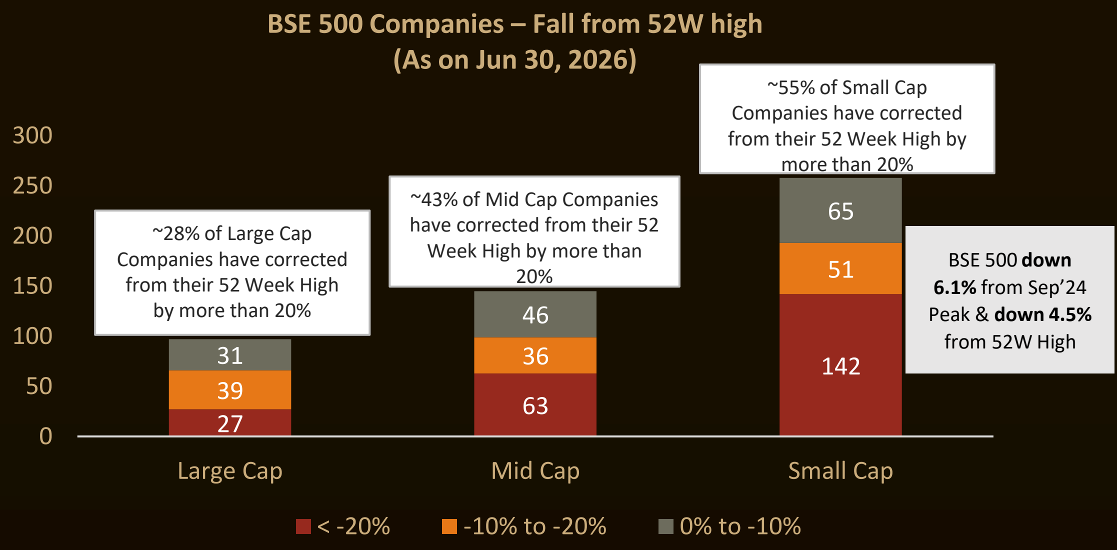
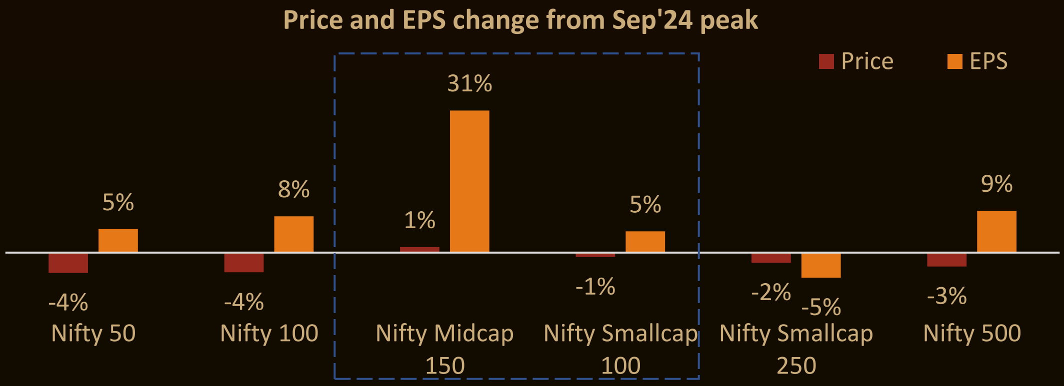


Exhibit 3: Price Lagging EPS Growth



SMID Caps Showing Resilience Amidst Volatility

The performance of the SMID segment might have been supported by stronger operating leverage, higher exposure to domestic cyclical sectors and faster earnings recovery across industrial and commodity linked businesses. Further, rising consumption, manufacturing expansion, digitalization, formalization of the economy, and increasing financialization of savings are expected to support earnings growth for small and mid-cap companies over the medium to long term.

Wider Opportunity Set in the SMID Segment

The 'Next 400' stocks present in the SMID universe offers greater stock selection options across different sectors. With 400 companies versus 100 in the large-cap segment, the Next 400 provides greater breadth, deeper sector representation and a wider opportunity set for identifying future market leaders.

Exhibit 4: Sector Classification

Sector	Top 100	Next 400
Consumer Discretionary	17	86
Financial Services	23	78
Fast Moving Consumer Goods	8	20
Telecommunication	1	9
Industrials	10	66
Commodities	13	42
Services	2	12
Energy	6	11
Utilities	6	11
Diversified	0	3
Healthcare	8	41
Information Technology	6	21

Emerging leaders may be found across manufacturing, financial services, healthcare, consumer discretionary, industrials, chemicals, technology services, capital goods, and domestic consumption-oriented businesses. Focus should be on companies with improving market share, governance standards, capital allocation discipline, and scalable business models.

Further, since the 2020 trough, mid and small-cap companies have witnessed a 1.6x increase in the corporate profit-to-GDP ratio. Correspondingly, the SMID segment's profit pool increased from INR 0.3 bn in FY20 to INR 1.3 bn in FY26.

SMID Caps Showing Resilience Amidst Volatility

Unlocking Value using Bottom-Up Stock Selection

We believe, bottom-up investing focuses on businesses with strong management, sound balance sheets, sustainable competitive advantages that have visible earnings growth. India's SMID segment continues to offer attractive long-term growth opportunities, but outcome is likely to depend increasingly on stock selection rather than broad exposure to the entire universe.

Despite a favorable long-term backdrop, selectivity remains critical given stretched valuations in certain pockets of the SMID segment. The universe may benefit from structural growth drivers such as rising consumption and manufacturing expansion. However, with market returns becoming more differentiated, broad-based participation is likely to give way to a more selective environment.

The Sector(s) mentioned in this material do not constitute any recommendation of the same. Past performance may or may not sustain in future and is no guarantee of future results.


Getting here has been hard. Going ahead doesn't have to be.
Your achievements have been challenging, but the journey ahead doesn't have to be!
Our Portfolio Management Services (PMS) & Alternative Investment Funds (AIF) are designed to help with your next investment milestone.
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Domestic Indices – 1M Change

Sensex	76,478.67	+ 2.28%
Nifty 50	23,865.75	+ 1.35%
Nifty Bank	57,542.90	+ 6.09%
Nifty Midcap 100	61,797.70	+ 0.12%
Nifty Smallcap 100	18,863.10	+ 3.99%

Data as of
30th June, 2026

International Indices – 1M Change

Dow Jones	52,319.20	+ 2.52%
Nasdaq 100	30,280.40	- 0.17%
S&P 500	7,499.35	- 1.06%
SSE Composite Index	4,094.40	+ 0.63%
NIKKEI 225	70,062	+ 5.84%

Data as of
30th June, 2026

Commodity – 1M Change

Crude Oil	$69.49	- 20.43%
Gold	$4006.90	- 11.75%
Silver	$58.46	- 22.31%

Data as of
30th June, 2026

Nifty Indices – 1M & 1Y Change

	1M	1Y
Infrastructure	(+) 0.42%	- 0.18%
Pharmaceuticals	(+) 4.03%	+ 14.92%
Public Sector Banks	(+) 4.13%	+ 17.91%
Private Sector Banks	(+) 6.09%	- 1.15%
Automobile	(+) 0.54%	+ 10.92%
Metal	(-) 6.86%	+ 31.30%
FMCG	(-) 1.19%	- 11.10%
Consumption	(+) 2.25%	- 2.77%

Price-to-Earnings (PE) Ratio

Nifty 50	20.6
Nifty 100	20.2
Nifty Midcap 100	29.8
Nifty SmallCap 100	32.5

Key Macro Indicators

10 Year Bond Yield	6.75%
Inflation	3.93%
Unemployment (CMEI)	6.64%
Mcap to GDP	1.3x

About PMS AIF WORLD

High Performance Investing

PMS AIF WORLD

PMS AIF World is a New Age Investment Services Company, providing analytics-backed good quality investing service experience with an endeavor and promise for wealth creation and prosperity. Over 4+ years, we have been managing 500+ UHNI & NRI families, across 1,000 Cr+ assets. We are very selective in our approach, and analyze products across 5 Ps – People, Philosophy, Performance, Portfolio, and Price with an endeavor to ascertain the Quality, Risk, and Consistency (QRC) attributes before suggesting the same to investors.

We offer responsible, long term investment service. Invest with us in the best quality products and make informed investment decisions.

Analytics Backed Quality Investing

India's Trusted Platform for Informed Investments by HNIs and NRIs

India's 1st 5-P Analysis across People | Philosophy | Performance | Portfolio | Price

Objective Selection through Q-R-C Scoring across Quality | Risk | Consistency

Why PMS AIF WORLD

Focused and Concentrated Portfolios

High Performance Philosophies

Adept Portfolio Managers

Zero Setup Fees

Best in Class Investment Service

Minimal Exit load Structures

India's Most Trusted and Best PMS & AIF Platform

800+
UHNIs & NRIs Served

2,000+
AUM (in Cr)

600+
PMSs & AIFs listed

10+
Countries

23+
Cities

20+
Years of Experience

PMS Performance & Alpha — Key Takeaways

ONE MONTH TOP PERFORMERS · SMID & SMALL CAPS LED

+14.54%	+14.49%	+1.53%
Money Grow Small Midcap	Equirus Wealth Long Horizon	BSE 500 TRI
Small & Mid Cap · 1M	Small Cap · 1M	Benchmark · 1M

Top PMS returned nearly 10× the broad market; Multi & Flexi-Cap strategies filled 5 of the top 10 monthly gainers.

ONE YEAR ALPHA LEADERS BY CATEGORY

MID & SMALL CAP	SMALL CAP	MULTI CAP
Sundaram SELF	Sundaram Rising Star	East Green Quant
+27.7%	+36.2%	+36.7%
1-Year Alpha	1-Year Alpha	1-Year Alpha

FIVE YEAR WEALTH CREATORS

33.7%	33.1%	24.6%
Green Lantern Growth	Aequitas India Opp.	Stallion Asset Core
5Y Return, p.a.	5Y Return, p.a.	5Y Return, p.a.

These names recur across the tenure and alpha tables — a signal of durable, repeatable skill rather than a single strong year.

WHAT IT MEANS FOR INVESTORS

- A broad-based rally lifted headline returns across the board — but alpha over the benchmark is what separates manager skill from market beta.
- Favour managers with multi-year alpha consistency (Aequitas, Green Lantern, Stallion) over one-year outliers that carry limited track records.
- SMID and Small Cap strategies are driving both this month's momentum and the strongest long-term alpha this cycle.

Data as of Jun 2026 · Trailing returns, annualised where >1Y · Source - APMI

Monthly Performance Leaderboard

Money Grow Small Midcap	Small & Mid Cap	+ 14.54%
Equirus Wealth Long Horizon Fund	Small Cap	+ 14.49%
Amaltas Strategic Opportunities Series 1	Multi Cap & Flexi Cap	+ 11.92%
White Whale RISING STAR PF	Multi Cap & Flexi Cap	+ 11.86%
Clockvine Growth Fund	Multi Cap & Flexi Cap	+ 11.41%
East Green Agile Strategy	Multi Cap & Flexi Cap	+ 11.35%
Tradeswift Sparkling Gems	Small Cap	+ 11.16%
Accelt Long Term Equity Fund	Multi Cap & Flexi Cap	+ 10.97%
Electrum Laureate Portfolio	Small & Mid Cap	+ 10.94%
Equitree Emerging Opportunities	Small Cap	+ 10.76%

Indices – 1M Change

BSE 500 TRI	Multi Cap & Flexi Cap	+ 1.53%
Nifty 50 TRI	Large Cap	+ 1.67%

PMS Ranked by Track Record -- 5 Year & 3 Year

5-Year Peer Group

Name	AUM	1M	3M	6M	1Y	2Y	3Y	5Y	SI
Sahasrar Concentrated Growth	1621.06	9.06%	43.55%	22.81%	26.68%	37.67%	38.28%	29.44%	29.44%
White Pine India Emerging Stars	501.47	5.75%	42.92%	19.72%	15.59%	15.87%	36.46%	37.28%	37.28%
Wallfort Ameya Fund	140.81	8.92%	36.26%	20.06%	9.35%	19.78%	25.52%	36.96%	36.96%
InCred Select Opportunities	176.10	1.65%	24.37%	-4.85%	4.65%	21.83%	27.78%	32.56%	32.56%
Ohm Growth	715.99	4.23%	33.08%	18.41%	16.85%	16.49%	27.75%	25.22%	25.22%
Himalaya EverFlow India Opportunities	449.88	8.26%	33.88%	13.20%	12.41%	18.93%	22.54%	25.36%	25.36%
Carnelian Bespoke Portfolio	3644.98	5.35%	27.13%	9.04%	11.96%	13.56%	24.06%	26.47%	26.47%
Axis Securities Kaizen	534.79	7.25%	28.28%	28.21%	21.99%	12.86%	24.88%	25.02%	25.02%
Wallfort Avenue Fund	146.40	-0.29%	11.64%	1.67%	18.36%	11.12%	27.07%	24.38%	24.38%
Molecule Ventures Growth	935.97	0.51%	28.14%	4.60%	16.98%	8.40%	23.35%	25.83%	25.83%

3-Year Peer Group

Name	AUM	1M	3M	6M	1Y	2Y	3Y	SI
Sahasrar Concentrated Growth	1621.06	9.06%	43.55%	22.81%	26.68%	37.67%	38.28%	29.44%
White Pine India Emerging Stars	501.47	5.75%	42.92%	19.72%	15.59%	15.87%	36.46%	37.28%
Wallfort Ameya Fund	140.81	8.92%	36.26%	20.06%	9.35%	19.78%	25.52%	36.96%
InCred Select Opportunities	176.10	1.65%	24.37%	-4.85%	4.65%	21.83%	27.78%	32.56%
Ohm Growth	715.99	4.23%	33.08%	18.41%	16.85%	16.49%	27.75%	25.22%
Himalaya EverFlow India Opportunities	449.88	8.26%	33.88%	13.20%	12.41%	18.93%	22.54%	25.36%
Carnelian Bespoke Portfolio	3644.98	5.35%	27.13%	9.04%	11.96%	13.56%	24.06%	26.47%
Axis Securities Kaizen	534.79	7.25%	28.28%	28.21%	21.99%	12.86%	24.88%	25.02%
Wallfort Avenue Fund	146.40	-0.29%	11.64%	1.67%	18.36%	11.12%	27.07%	24.38%
Molecule Ventures Growth	935.97	0.51%	28.14%	4.60%	16.98%	8.40%	23.35%	25.83%

PMS Ranked by Track Record -- 2 Year & 1 Year

2-Year Peer Group

Name	AUM	1M	3M	6M	1Y	2Y	SI
Xponent Tribe Long-Term Equity	157.13	8.91%	52.72%	40.86%	53.27%	34.94%	40.59%
360 ONE Large Value PMS	854.69	5.00%	5.08%	3.80%	-9.11%	64.83%	59.44%
KRIIS High Growth Strategy	135.03	14.91%	58.25%	35.82%	31.29%	34.00%	38.89%
AlfAccurate Couture PMS	352.97	5.70%	43.58%	29.08%	37.10%	20.02%	24.10%
InCred Focused Healthcare Equity	149.30	0.76%	23.88%	-4.85%	7.36%	28.75%	36.44%
Fortuna One	88.74	4.00%	29.56%	9.73%	16.84%	15.26%	28.66%
Capital 8 Infinity Fund	169.72	-6.85%	13.21%	18.86%	18.91%	9.34%	25.06%
Clockvine Growth Fund	97.21	11.41%	33.15%	15.43%	19.71%	13.21%	17.43%
Abakkus Curated Personalized Portfolio	148.50	4.32%	37.71%	17.45%	10.23%	11.34%	26.01%
Pioneer Diversified Equity	798.34	0.55%	18.95%	8.71%	15.86%	10.59%	20.92%

1-Year Peer Group

Name	AUM	1M	3M	6M	1Y	2Y
Xponent Tribe Managed Wealth Portfolio	132.34	6.03%	59.13%	52.87%	64.21%	62.81%
Qode Growth Fund	76.67	6.69%	33.40%	33.12%	23.67%	34.89%
Amaltas Keystone Fund	61.55	7.22%	55.34%	34.92%	24.59%	20.52%
Qode All Weather	194.68	-2.30%	4.64%	15.43%	27.86%	26.47%
Brightseeds Maverick Strategy	67.06	8.55%	49.31%	26.03%	15.29%	16.87%
Bharat Bhushan Micro-Mega	74.10	2.53%	25.35%	14.56%	18.15%	23.36%
Angel One Ionic Allocate Portfolio-Moderate	68.48	-0.89%	7.18%	5.79%	23.88%	24.36%
Prospero Tree India Equity Fund	484.94	4.82%	30.02%	10.80%	7.54%	30.13%
Ambit IRIS Portfolio	784.89	1.26%	5.08%	7.75%	21.60%	16.50%
Qode Tactical Fund	37.55	-0.27%	8.22%	15.32%	12.76%	16.73%

Mid & Small Cap PMS — Ranked by Alpha

1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Inception Date
Sundaram S.E.L.F	1027.23	32.45%	2.08%	30.37%	23.32%	17.42%	Jun 2010
Wallfort Avenue Fund	146.4	18.36%	2.08%	16.28%	27.07%	-	Apr 2022
Brightseeds Xylem Maverick	67.06	15.29%	2.08%	13.21%	-	-	Jan 2025
AlfAccurate Budding Beasts	1091.91	14.86%	2.08%	12.78%	23.43%	23.79%	Jan 2021
Samvitti PMS Long	243.76	14.68%	2.08%	12.60%	16.22%	15.82%	Nov 2015

3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Inception Date
Wallfort Diversified	574.44	8.72%	39.25%	19.14%	20.11%	25.76%	Nov 2018
Green Lantern Growth Fund	1769.4	8.56%	35.25%	19.14%	16.11%	33.66%	Dec 2017
Seers Enduring Portfolio	406.21	7.55%	27.36%	19.14%	8.22%	30.58%	May 2017
Wallfort Avenue Fund	146.4	18.36%	27.07%	19.14%	7.93%	-	Apr 2022
Aditya Birla Select Sector Portfolio	587.94	6.43%	26.26%	19.14%	7.12%	19.86%	Oct 2009

5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Inception Date
Green Lantern Growth Fund	1769.4	8.56%	35.25%	33.66%	16.97%	16.69%	Dec 2017
Seers Enduring Portfolio	406.21	7.55%	27.36%	30.58%	16.97%	13.61%	May 2017
Wallfort Diversified	574.44	8.72%	39.25%	25.76%	16.97%	8.79%	Nov 2018
AlfAccurate Budding Beasts	1091.91	14.86%	23.43%	23.79%	16.97%	6.82%	Jan 2021
Electrum Laureate Portfolio	658.96	11.88%	23.84%	22.45%	16.97%	5.48%	Nov 2020

*Benchmark: Nifty MidSmall 400

Small Cap PMS — Ranked by Alpha

1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Inception Date
Sundaram Rising Star	121.01	37.10%	-0.44%	37.54%	17.88%	16.80%	Nov 2009
Aequitas India Opportunities	2636.99	32.00%	-0.44%	32.44%	34.86%	33.09%	Feb 2013
Qode Growth Fund	76.67	23.67%	-0.44%	24.11%	-	-	Mar 2025
Equirus Long Horizon Fund	368.85	14.87%	-0.44%	15.31%	17.53%	13.01%	Oct 2016
Valentis Rising Star Opportunity Fund	1078.06	10.76%	-0.44%	11.20%	13.71%	16.16%	Aug 2016

3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Inception Date
Aequitas India Opportunities	2636.99	32.00%	34.86%	18.89%	15.97%	33.09%	Feb 2013
Equitree Emerging Opportunities	1512.21	-2.59%	27.19%	18.89%	8.30%	23.23%	Jul 2017
Counter Cyclical Diversified Long Term Value	971.67	-2.88%	21.68%	18.89%	2.79%	30.95%	Jul 2019
Sundaram Rising Star	121.01	37.10%	17.88%	18.89%	-1.01%	16.80%	Nov 2009
Equirus Long Horizon Fund	368.85	14.87%	17.53%	18.89%	-1.36%	13.01%	Oct 2016

5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Inception Date
Aequitas India Opportunities	2636.99	32.00%	34.86%	33.09%	15.96%	17.13%	Feb 2013
Counter Cyclical Diversified Long Term Value	971.67	-2.88%	21.68%	30.95%	15.96%	14.99%	Jul 2019
Equitree Emerging Opportunities	1512.21	-2.59%	27.19%	23.23%	15.96%	7.27%	Jul 2017
Valentis Rising Star Opportunity Fund	1078.06	10.76%	13.71%	16.16%	15.96%	0.20%	Aug 2016
iThought VRDDHI	367.63	-10.99%	7.97%	15.45%	15.96%	-0.51%	May 2021

*Benchmark: As reported on APMI portal

Multi & Flexi Cap PMS — Ranked by Alpha

1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Inception Date
Sundaram SISOP	1864.55	30.80%	-2.93%	33.73%	24.93%	18.46%	Feb 2010
Qode All Weather	194.68	27.86%	-2.93%	30.79%	-	-	Nov 2024
Sundaram Voyager	218.29	27.04%	-2.93%	29.97%	24.26%	18.51%	Oct 2011
KRIIS Multicap Fund	359.87	26.64%	-2.93%	29.57%	28.74%	20.05%	May 2019
Turtle Growth Mantra Fund	166.26	25.18%	-2.93%	28.11%	20.37%	10.54%	Oct 2020

3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Inception Date
Stallion Asset Core Fund	8102.31	12.43%	36.27%	11.30%	24.97%	24.63%	Oct 2018
KRIIS Multicap Fund	359.87	26.64%	28.74%	11.30%	17.44%	20.05%	May 2019
InCred Healthcare Portfolio	657.18	11.29%	26.96%	11.30%	15.66%	15.34%	Feb 2021
Asit C. Mehta Ace Multicap	116.96	2.88%	25.79%	11.30%	14.49%	23.04%	Aug 2018
Samvitti ActiveAlpha MC	476.51	9.57%	25.39%	11.30%	14.09%	24.24%	Apr 2021

5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Inception Date
Green Portfolio Super 30 Dynamic Fund	245.62	15.29%	21.42%	26.91%	10.87%	16.04%	Sep 2019
Stallion Asset Core Fund	8102.31	12.43%	36.27%	24.63%	10.87%	13.76%	Oct 2018
Samvitti ActiveAlpha MC	476.51	9.57%	25.39%	24.24%	10.87%	13.37%	Apr 2021
ICICI Prudential Value Strategy	1148.22	8.29%	20.95%	21.37%	10.87%	10.50%	Jan 2004
Negen Special Situations & Dynamic Allocation	1451.43	-0.98%	24.40%	20.61%	10.87%	9.74%	Aug 2017

*Benchmark: As reported on APMI portal

Understanding Alternatives: The Alpha Classroom

Wealth doesn't just like to grow; it likes to grow smartly. High Net-Worth Individuals (HNIs) already know how to make money. The real art lies in making that money behave. And for that, two sophisticated tools dominate the wealth management scene: Portfolio Management Services (PMS) and Alternative Investment Funds (AIFs).

These aren't your everyday mutual funds. They're more like the VIP lounges of the investing world with exclusive entry, personalized strategies, and a quiet promise: "We'll treat your capital with more respect than the market usually does." But what makes HNIs turn to PMS and AIFs? The short answer: diversification with dignity. The long answer? Let's get into that.

Diversification

HNIs understand what retail investors often don't, i.e., diversification isn't about owning 20 mutual funds that all hold the same 10 large-cap stocks.

Real diversification involves mixing strategies, asset classes, and styles to balance risk and reward.

That's where PMS and AIFs enter, like the well-dressed disruptors they are. The Best PMS in India 2025 offers personalized equity portfolios managed by professional fund managers who actually look at balance sheets and not just social media sentiment.

Meanwhile, the Best AIF in India 2025 gives access to unlisted equities, private credit, venture capital, and long-short strategies that go far beyond traditional markets.

PMS (Portfolio Management Services)

HNIs prefer PMS because it feels like getting a suit stitched instead of buying one off the rack. The Best PMS company in India doesn't sell "products"; it designs portfolios aligned with each investor's risk profile, liquidity needs, and financial goals.

These portfolios typically invest in 20–25 well-researched stocks, offering higher conviction (and sometimes higher volatility) than mutual funds. The difference?

AIF (Alternative Investment Funds)

While PMS handles listed equities with precision, AIFs invite investors into spaces mutual funds can't reach. Think of private equity, pre-IPO opportunities, real estate, structured credit, and even long-short hedge strategies.

However, the Best AIF in India 2025 isn't about taking reckless bets; it's about accessing markets where inefficiencies still exist. For HNIs, this means getting exposure to high-growth private companies before the rest of the world even hears about them.

Strategic Balance: The PMS + AIF

The ultimate strategy is when PMS and AIF are used together. It's the financial equivalent of combining logic and imagination. PMS ensures stability through direct equities and transparency, while AIF adds growth potential and tactical depth.

HNIs often use PMS as their "core" portfolio (considering how long-term, disciplined, equity-focused it is), and AIF as their "satellite" allocation (considering how dynamic, alternative, and high-opportunity driven it is). This structure not only smooths volatility but also opens up new return avenues without taking blind risks.

Risk Management

HNIs don't diversify out of fear; they diversify out of foresight. A PMS helps them manage market risk with active rebalancing, while an AIF adds diversification against traditional equity volatility.

For example, private credit AIFs can offer steady yields even when markets wobble, and venture capital AIFs can create asymmetric returns during bull runs.

The Best PMS company in India often collaborates with AIFs to construct multi-asset portfolios that behave differently across economic cycles. So, instead of reacting to volatility, HNIs position themselves to profit from it.

Global Diversification with Local Expertise

Modern HNIs are increasingly using PMS and AIFs not just for domestic diversification, but also as gateways to global opportunities. Some AIFs allocate to international equities or private markets, blending Indian growth with global resilience.

Wrapping Up

Here's the thing: HNIs don't necessarily have better instincts. They just have better systems. They use platforms like PMS AIF WORLD to compare, analyze, and invest with precision.

They look beyond surface returns and focus on risk-adjusted performance, portfolio construction, and manager accountability. In short, they do their homework or let data-backed platforms do it for them.

That's why they don't chase the market. They structure it. By combining the analytical strength of PMS with the alternative depth of AIFs, they build portfolios that grow consistently, protect during downturns, and evolve with markets.

Because wealth, after all, isn't just about returns. It's about control, calm, and the quiet confidence of knowing your money is working harder than the headlines.