



PMS AIF WORLD
High Performance Investing

JUNE, 2022 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
JUNE, 2022

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Risks or Returns:

What should be the focus while selecting a PMS?



**Kamal
Manocha**
CEO,
PMS AIF World

Dear Investors,

Hope you are keeping well.

Most investors approach equity investing, first thinking about risk, and then about return. And, since PMS is primarily an equity investing instrument, it is also approached generally with a risk focused approach than a returns focused strategy.

But what should be the ideal approach?

Ideally speaking, while selecting a PMS, the investor focus should to be on returns more than risk. Simply because, PMS is a product meant for wealth creation. And, wealth is not created unless risk is taken. So, risk should be accepted, but focus should be on returns. I am not saying that fear of loss should not be there. Fear is good, as it is because of the fear, one uses vivid judgement and takes every step with caution to make informed decisions in life. And, this is why smarter PMS companies market their products highlighting the positioning of consistent compounding, wealth preservation, and show their focus on superior risk management.

The problem is that when investors focus too much on risk, they get into imagination and struggle with their fears based on negative emotions thinking about either past events when equity market had crashed and suffered losses or foresee the future with similar emotions and end up actually making an emotionally satisfying decision, but not a rationally well informed decision.

Positive approach to life says, 'One should not worry about past or future; one should learn from the past, but focus on the present, and hope for a greater future.'

Going by the definition of a risk of a diversified equity portfolio like a PMS itself – it's nothing but volatility in returns.

Risks or Returns:

What should be the focus while selecting a PMS?

And, Equity PMS investment is not meant for short term, but long term, and so, volatility itself gets taken care to a greater extent. Those who have understood this simple fact, accept risk and then focus time and effort on selecting a good PMS for good returns which is actually not an easy process. It requires full understanding about the portfolio manager, investment philosophy, performance track record, portfolio holdings, price and fee structure. If mind is crowded with focus on risk, one will not be able to make a good and unbiased selection and in fact, one will have a tendency to fall trap to those PMSs which position themselves as relatively lower on risk.

More important is to focus on returns from the perspective of knowing convincingly that what type of risk is being taken by the PMS for generating returns. And, not losing the focus from returns, investors should build conviction and comfort with the type of risk being taken.

Out of 3 investment styles - Growth, Value, Momentum, those who do not understand value investing, feel growth has lower risk, but those who understand value investing, find growth companies to be relatively very expensive. And, those who do not understand momentum investing, find it to be most risky as one ignores business fundamentals, but, once who understand momentum investing hold a diagonally opposite perspective in this regards.

PMS is not a common man's product; and thus it should not be evaluated with common man's risk averse approach. PMS is an HNI product meant for serious wealth creation over long term, and so should be selected & evaluated with risk pro entrepreneurial approach where cognizance of risk is not missed, but focus is primarily on returns.

Rather than being awry, investors should ask an honest question – Am I investing Rs 50 lacs & more in a PMS for long term, for good returns or for moderate to low risk? Once an investor develops a clarity with respect to this question, and understands the weightage of returns over risk- only then should he be ready to invest in a PMS.

UPCOMING!!!

Mid Year Event 2022

Confluence of Top PMS AIF Mangers in India

Why was PMS AIF WORLD created?

Wealth management industry is not designed to be fair. This led to the creation of PMS AIF WORLD, where we focus on best quality products, analysis backed selection, and finest educative approach for informed investment decisions.

Our right intent, and relentless efforts have made us a trusted platform in the space of alternates.



PMS AIF WORLD

What to expect from the Confluence of Top PMS AIF Managers in India

ROARING INDIA

As the Indian corporate and economic recovery happens, we are sure it will happen with a roar, and we take the challenge to find insights on how investors can participate in this roaring recovery.

REALISTIC SOLUTIONS

As we understand and value the time of our clients and investors, we aim to provide realistic solutions through this event, that will provide the right perspective and method to investing for wealth creation.

RELATABLE QUESTIONS

As concerns with the markets and the economy persist all along, we will take up real questions that investors are asking and seeking answers to, from the best investing minds in the country today.

REVERED MANAGERS

We promise to bring the best money managers in the country, all in one action packed event spread over 2 days as they share experience & discuss the challenges & opportunities in the market.



PMS AIF WORLD

Title Partner



WHITEOAK
CAPITAL MANAGEMENT

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AXIS ASSET MANAGEMENT



CARNELIAN



IIFL
ASSET MANAGEMENT



THE INVESTMENT
TRUST OF INDIA
LONG-SHORT EQUITY FUND



MOTILAL OSWAL
ASSET MANAGEMENT



SUNDARAM ALTERNATES
UNEARTHING OPPORTUNITIES

TATA

ASSET
MANAGEMENT

Confluence of Top PMS AIF Managers in India

Summer of '22

Mid Year
Summit
8th & 9th July '22

Equity is in the Air

By



PMS AIF WORLD

Top 10 Portfolios In Each Peer Group (Data as of 31st May 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	985.58	-7.1%	-1.7%	-6.9%	6.3%	58.8%	28.9%	14.1%	25.1%	23.4%	Small Cap	Raman Nagpal
ValueQuest	Growth Scheme	692.54	-7.5%	-5.2%	-6.8%	5.4%	50.6%	25.1%	12.0%	19.4%	17.0%	Multi Cap	Sameer Shah
Sundaram	SELF	644	-7.0%	-3.7%	-8.1%	8.8%	44.6%	19.9%	14.2%	19.3%	17.6%	Mid & Small	Madanagopal Ramu
Karma Capital	Long Only	3949	-7.0%	-6.7%	-12.1%	6.9%	50.8%	15.2%	7.4%	18.1%	13.2%	Multi Cap	Rushabh Sheth
Sundaram	SISOP	975	-6.9%	-4.0%	-9.1%	8.0%	38.4%	17.6%	13.1%	15.6%	17.9%	Multi Cap	Madanagopal Ramu
Girik Capital	MultiCap	766.85	-5.9%	-8.1%	-10.9%	0.5%	29.4%	18.0%	13.4%	22.0%	19.4%	Multi Cap	Charandeep Singh
Alchemy	High Growth Select Stock	3222	-5.7%	-1.5%	-6.0%	16.0%	38.8%	11.4%	11.8%	19.0%	20.0%	Multi Cap	Hiren Ved
Alfaccurate	IOP	1168	-3.3%	-1.9%	-5.6%	5.8%	35.1%	15.9%	11.4%	20.2%	18.2%	Multi Cap	Rajesh Kothari
ASK	IEP	19053	-9.1%	-5.1%	-9.9%	5.8%	33.7%	15.0%	13.6%	20.3%	18.0%	Multi Cap	Chetan Thacker
Quest	Flagship	747	-4.6%	-3.8%	-8.8%	1.0%	33.7%	12.0%	8.4%	17.2%	16.2%	Multi Cap	Aniruddha Sarkar

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	2200	-6.7%	-1.3%	-6.7%	8.5%	53.1%	23.8%	17.0%	28.1%	Mid & Small	Samit Vartak
Aequitas Investment	India Opportunities Product	1224.35	-9.5%	4.6%	7.4%	27.7%	71.6%	15.6%	13.5%	29.6%	Small Cap	Siddhartha Bhaiya
Buoyant	Opportunities Multicap	376	-6.3%	-3.4%	-4.2%	20.4%	63.0%	20.3%	17.5%	20.3%	Multi Cap	Sachin Khivasara
Equirus	Long Horizon	527.21	-8.1%	-5.8%	-14.4%	2.6%	58.5%	31.7%	22.3%	23.1%	Mid & Small	Viraj Mehta
SBI	ESG Portfolio	-	-1.7%	5.7%	2.7%	23.4%	52.0%	24.3%	17.8%	15.4%	Multi Cap	Aparna Shanker
Nine Rivers	Aurum Small Cap Opp.	-	-8.2%	-1.4%	-6.3%	-1.0%	72.7%	21.9%	11.4%	27.5%	Small Cap	Sandeep Daga
Sameeksha	Equity	545.5	-4.2%	-3.6%	-8.3%	6.1%	47.7%	26.3%	18.1%	20.1%	Multi Cap	Bhavin Shah
Aditya Birla	SSP	288	-4.5%	1.2%	-5.4%	8.5%	47.7%	19.6%	8.2%	15.0%	Mid & Small	Vishal Gajwani
Kotak	SSV 1	503	-6.1%	-2.2%	-2.5%	12.5%	46.5%	11.4%	3.7%	13.5%	Multi Cap	Anshul Saigal
IIFL	Multicap	-	-5.6%	-5.9%	-7.8%	4.7%	32.2%	15.8%	15.6%	18.0%	Multi Cap	Anup Maheswari

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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 May 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
Negen Capital	Special Situations & Tech Fund	284.2	-7.0%	3.4%	0.9%	21.9%	94.9%	31.8%	-	14.0%	Multi Cap	Neil Bahal
Sage One	Small Cap	600	-9.3%	-1.0%	-6.6%	14.2%	66.0%	36.5%	-	34.7%	Small Cap	Samit Vartak
UNIFI	Blended Fund - Rangoli	-	-6.7%	-3.3%	-5.4%	13.0%	53.1%	30.4%	-	22.1%	Mid & Small	Sarath Reddy
Green	Special	158.32	-8.1%	0.0%	1.4%	14.3%	48.5%	29.1%	-	27.1%	Multi Cap	Divam Sharma
Wize Market Analytics	Capital Mind-Momentum	392.08	-8.2%	-3.5%	-8.0%	4.0%	44.2%	25.9%	-	25.7%	Multi Cap	Anoop Vijaykumar
Stallion	Core Fund	543.04	-5.6%	-5.5%	-15.0%	2.8%	35.0%	23.2%	-	23.3%	Multi Cap	Amit Jeswani
Ambit	Emerging Giants	221.85	-6.1%	-4.2%	-9.0%	-1.4%	38.0%	23.6%	-	14.0%	Mid & Small	Aishvarya Dadheech
ITUS Capital	Fundamental Value Fund	722.47	-4.2%	0.6%	-7.7%	4.8%	31.9%	20.3%	-	20.7%	Multi Cap	Naveen Chandramohan
NJ	Bluechip	1128.9	-7.6%	-5.0%	-13.5%	7.7%	35.2%	19.7%	-	15.4%	Multi Cap	Viral Shah
White Oak	India Pioneers	7180	-5.5%	-5.4%	-8.5%	3.5%	32.7%	18.7%	-	18.7%	Multi Cap	Team White Oak
Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
KRIIS	Multi Cap Advantage	90	-3.1%	2.9%	-7.4%	23.4%	58.3%	-	-	39.0%	Multi Cap	Rakesh Doshi
ICICI	PIPE	684.8	-6.9%	3.0%	2.1%	21.0%	55.6%	-	-	26.6%	Small Cap	Anand Shah
Upside AI	Multicap	-	3.8%	-3.0%	-4.9%	24.7%	32.2%	-	-	23.4%	Multi Cap	Kanika Agarrwal
Marcellus	Little Champs	883	-4.6%	0.6%	-6.4%	3.8%	42.5%	-	-	31.0%	Small Cap	Ashvin Shetty
First Global	India Super 50	-	-6.3%	-5.5%	-10.1%	4.9%	37.1%	-	-	28.5%	Multi Cap	Devina Mehra
Motilal	Focused Mid Cap	297	-11.9%	-8.6%	-13.9%	0.4%	40.8%	-	-	26.6%	Mid & Small	Rakesh Tarway
Alchemy	Ascent	426	-9.7%	-7.2%	-9.0%	1.0%	41.5%	-	-	17.6%	Multi Cap	Hiren Ved
Helios	India Rising	559.58	-4.0%	-4.4%	-8.5%	4.6%	28.3%	-	-	25.7%	Multi Cap	Dinshaw Irani
Lake Water Advisors	Lake Water	-	-9.5%	-10.1%	-17.1%	-3.3%	40.7%	-	-	14.4%	Multi Cap	Pankaj Singhania
Carnelian	Capital Compounder	-	-4.2%	-3.9%	-12.2%	1.7%	27.3%	-	-	14.8%	Multi Cap	Manoj Bahety

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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 May 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	-	-6.4%	3.2%	-2.5%	22.9%	-	-	-	61.4%	Multi Cap	Koushik Mohan
Roha	Emerging Champions	-	-8.9%	-3.3%	-3.2%	18.0%	-	-	-	50.5%	Mid & Small	Dhiraj Sachdev
Upside AI	250	-	-1.8%	-1.1%	7.4%	23.1%	-	-	-	25.3%	Large Cap	Kanika Agarrwal
Carnelian	Shift Strategy	-	-4.8%	0.6%	-6.3%	11.8%	-	-	-	47.9%	Multi Cap	Manoj Bahety
Kunvarji	Multicap Fund	-	-2.2%	-4.0%	-6.1%	10.4%	-	-	-	48.1%	Multi Cap	Ravi Diyora
Moat	Special Opp. Fund	-	-3.0%	0.4%	6.7%	8.9%	-	-	-	35.0%	Multi Cap	Koushik Mohan
Abakkus	All Cap Approach	-	-6.9%	-2.7%	-4.2%	9.0%	-	-	-	40.4%	Multi Cap	Sunil Singhania
Abakkus	Emerging Opportunities	-	-10.7%	-4.6%	-7.1%	8.0%	-	-	-	43.2%	Mid & Small	Sunil Singhania
Alfaccurate	Emerging Giants	-	-5.1%	-1.7%	-3.0%	17.3%	-	-	-	26.1%	Mid & Small	Rajesh Kothari
IIFL	Phoenix	-	-4.8%	0.3%	-2.3%	9.3%	-	-	-	14.6%	Multi Cap	Anup Maheshwari

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
TCG	RAF	-	4.5%	2.4%	9.6%	-	-	-	-	17.7%	Multi Cap	Chakri Lokapriya
TCG	\$5 Trillion Fund	-	-1.8%	2.4%	9.6%	-	-	-	-	37.8%	Multi Cap	Chakri Lokapriya
Ambit	TenX	-	-5.6%	-3.0%	-	-	-	-	-	-8.6%	Mid & Small	Aishvarya Dadheech
Marcellus	Rising Giants	322	-7.4%	-8.2%	-	-	-	-	-	-19.4%	Mid & Small	Ashvin Shetty
White Oak	Digital Leaders	78	-7.4%	-6.6%	-	-	-	-	-	-20.6%	Multi Cap	Team White Oak
Anand Rathi	Decennium	-	-8.1%	3.0%	-2.3%	-	-	-	-	-5.8%	Multi Cap	Mayur Shah
Magadh Capital	Value For Growth	-	-8.1%	-2.8%	-6.4%	-	-	-	-	-9.8%	Multi Cap	Vipul Prasad
Magadh Capital	Future Stars	-	-8.3%	-2.6%	-3.6%	-	-	-	-	-2.7%	Mid & Small	Vipul Prasad
Moat	Uppercrust Wealth Fund	-	-9.1%	-2.8%	-	-	-	-	-	-14.1%	Multi Cap	Koushik Mohan

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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 May 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	-	-7.3%	8.6%	13.7%	66.7%	77.0%	29.7%	16.7%	20.8%	18.0%	Small Cap
Care	Growth Plus Value	534	-8.5%	4.5%	7.0%	20.8%	70.3%	25.1%	9.9%	26.0%	21.9%	Mid & Small
Master Portfolio	MPSL Vallum India Discovery	534.2	-8.2%	-2.9%	-8.6%	6.0%	53.5%	22.6%	15.1%	28.6%	26.8%	Mid Cap
Sundaram	Voyager	269	-6.5%	-4.1%	-9.1%	8.3%	42.1%	21.4%	15.8%	21.6%	20.4%	Multi Cap
Narnolia	Multicap	290	-1.8%	-0.4%	-4.2%	15.6%	37.9%	20.0%	15.8%	21.0%	20.1%	Multi Cap
Sundaram	Rising Stars	81	-6.3%	-2.0%	-3.7%	16.2%	47.7%	13.5%	7.1%	18.1%	14.5%	Small Cap
Centrum	Microcap	-	-3.9%	5.3%	2.1%	21.0%	68.5%	30.6%	18.0%	-	19.7%	Small Cap
Valentis	Rising Star Opportunity	-	-9.8%	-5.8%	-6.5%	15.3%	73.4%	24.5%	17.4%	-	17.4%	Mid & Small
ValueQuest	Platinum Scheme	177.3	-8.3%	-2.9%	-2.7%	11.5%	58.4%	33.4%	19.6%	-	18.7%	Multi Cap
Green Lantern Capital LLP	Growth Fund	-	-5.3%	2.3%	-1.9%	22.5%	71.0%	25.0%	-	-	11.2%	Mid & Small

- 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 150 Cr, in 2 Year at 50 Cr. No AUM filer for less than 2Y.
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YOU could be emotional while investing in your Motherland, INDIA

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Top 10 Portfolios In Each Peer Group (Data as of 31st May 2022)

Peer Group 8: Best as per March 2022 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
TCG	RAF	-	4.5%	2.4%	9.6%	-	-	-	-	-	17.7%	Multi Cap
Upside AI	Multicap	-	3.8%	-3.0%	-4.9%	24.7%	32.2%	-	-	-	23.4%	Multi Cap
Motilal	BOP	1221	-0.5%	-2.2%	-5.5%	2.2%	25.6%	11.5%			8.8%	Multi Cap
TCG	Multicap	-	-0.6%	0.2%	-0.1%	0.0%	26.2%	17.7%	25.8%	-	46.2%	Multi Cap
Anand Rathi	MNC	-	-0.7%	0.4%	-5.0%	8.0%	22.4%	17.6%			11.5%	Thematic
QRC	Long Term	-	-1.0%	1.0%	-4.5%	14.3%	35.6%	16.7%	-	-	12.2%	Multi Cap
Asit C Mehta	Ace 15	-	-1.2%	2.7%	5.5%	10.3%	31.4%	10.6%	-	-	8.3%	Large Cap
Eklavya Capital	Long Term Value (LTV)	-	-1.3%	1.7%	-0.5%	3.4%	14.4%	9.3%	8.3%		8.4%	Multi Cap
Alfaccurate	Focus	-	-1.4%	-2.2%	-4.4%	8.2%	32.9%	14.9%	12.2%		13.8%	Multi Cap
SBI	ESG Portfolio	-	-1.7%	5.7%	2.7%	23.4%	52.0%	24.3%	17.8%	-	15.4%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	-3.0%	-1.2%	-2.3%	6.4%	31.5%	11.6%	11.5%	17.9%	Large Cap
Nifty 500	-4.5%	-1.3%	-3.6%	6.8%	34.4%	12.9%	11.1%	13.7%	Multi Cap
Nifty Mid Cap 100	-5.3%	0.2%	-4.6%	9.8%	46.0%	16.4%	10.1%	-	Mid Cap
Nifty Small Cap 100	-10.2%	-6.5%	-13.6%	-0.6%	51.7%	12.0%	5.1%	-	Small Cap

- All data is as shared by respective AMC and is as TWRR guidelines.
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- Data above 1Y is CAGR and upto 1Y is Absolute returns.

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RISK DISCLAIMER: The performance data has been mainly captured from the latest factsheets procured from respective PMS companies and is as of 31st May, 2022. Performance up to 1 Year is absolute and above 1 Year is Annualized. PMS AIF WORLD has taken due care in collating the data from respective providers and has been done on best effort basis. PMS AIF WORLD should not be held responsible for any errors for the results arising from the use of this data whatsoever. Investments are subject to market related risks. The report is meant for general information purpose and not to be construed as any recommendation. Past Performance may or may not be sustained in future and should not be used as a basis for comparison with other investments. Please read the disclosure documents carefully before investing. Portfolio Management Services are market linked and do not offer any guaranteed/assured returns.

SPECIAL DISCLAIMER: Different Portfolio Management Services present number differently. Most data has been prepared with TWRR method as stipulated by SEBI, however, there are still some differences as some strategies started as advisory services and not PMS. It is imperative to understand this difference before comparing the performance for any investment decision. Thus, it is necessary to deep dive not only performance, but also, people, philosophy, portfolio, and price before investing. We do such detailed 5P analysis. Do not just invest, Make an informed investment decision.

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