



**PMS AIF WORLD**  
High Performance Investing

**JUNE, 2021 NEWSLETTER**

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

**MONTH**  
JUNE, 2021

**PREPARED BY**  
PMS AIF WORLD

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**MONTHLY PERFORMANCE REPORT**

# Trusted Alternates Focused Platform

## PMS AIF WORLD

PMS AIF World is an alternates focused, new age investment services company, providing analytics-backed quality investing service with an endeavour and aim of assisting investors' journey of long-term wealth creation and prosperity. The Investment Service Industry isn't designed to be Fair; there are hundreds of products and strategies that waste time and money. So, one must practice caution while investing.

We offer responsible, long term investment service. We distribute well analysed PMS and AIF products and offer investment service along with in-depth information for investors to make informed decisions not just before investing, but throughout the wealth creation journey.

We are very selective in our approach, and analyse PMS AIF products across **5 Ps – People, Philosophy, Performance, Portfolio, Price**, with an objective to ascertain 3 most important attributes i.e. **Quality, Risk, and Consistency(QRC) for assisting informed investment decisions.**

*Genuine*

*Visionary*

*Creative*

*Focused*

*Persistent*

# Roaring India: The necessary Pit Stops before the Winning Lap



**Kamal Manocha**  
CEO & Chief Strategist,  
PMS AIF World

Dear Readers,

Hope you are keeping well.

We present to you our monthly newsletter and as we promised on our twitter poll, we let our followers choose our cover Topic for this edition.

Every decade trends change; the way people do business changes. With these changes come opportunities and challenges, more often than not changes bring about more opportunities than challenges. Let's get a little anecdotal evidence, during the 2008 Global Financial Crisis the choice of mobile device for most corporate honchos was Blackberry for its internet and email features; teenagers used the more stylish Motorola Raz-r, while Nokia was also quite common, the popular choice for portable music was Apple's i-Pod and Sony's Portable version of PlayStation was another extremely popular device. The economic boom of early 2000s to 2008 made many consumers financially able to afford all these devices, however, post the GFC as affordability and economic hope remained subdued, Apple combined all the features into one device: the iPhone, it could do what most Blackberrys did, it was extremely stylish, it could play music and you could play games on it too. This was the opportunity of a lifetime and it made Apple a company worth almost a couple of trillion dollars in less than 10 years. The opportunity post any crisis is always huge and investors in the right place with the right allocation tend to make tremendous amounts of money.

The title of this report takes cues from the sport of Car Racing. Pit Stops are necessary in car racing. When performance cars race that fast and aim for the win, it's not just upon the driver but the car has a role to play, too. The Pit Stops and the Pit crew ensure that the car will be absolutely in sync with the driver's capabilities to help him achieve top of the line performance. Pit stops are something we would want to do away with, but the reality is that we can't, without the risk of significant harm.

# **Roaring India: The necessary Pit Stops before the Winning Lap**

Pit Stops for the Indian economy will be each reform that we make in our journey to the next couple of trillion dollars in our economy. Some of these pit stops might seem to slow us, however most of these pit stops would be very essential to achieve sustainable and quality growth. With every pit stop India makes, India will emerge as a better place to do business. Don't get me wrong though, I am not saying Equity Investments is going to be a high-octane adrenaline infused activity like Car Racing. Equity Investments for long term investor could be boring, could require some patience and will certainly require a lot of conviction. The investors will be like the drivers and the Pit Stops will be an added impetus external to them to enhance their returns.

We have taken a few Pit Stops in the last 10 years, most of these pit stops were also met with sudden knee jerk reactions but turned out as accelerators in disguise. A few of the Pit Stops we took in the last 5 years of the Indian Bull Run are: 1) Demonetization 2) RERA 3) GST 4) Bank Balance Sheet Clean Up 5) NBFC Clean up.

With each of these Pit Stops over the last few years, we have added to the GDP as well as overall Market Capitalization of the country. We have added more than a trillion dollars in Market Cap and almost a 600 billion dollars in GDP. We have also added more than 100 billion dollars in Forex Reserves of the RBI. Most of these Pit Stops have done much good (intended or unintended), for example Demonetization accelerated the cause of Jan Dhan Bank accounts making Direct Benefit Transfer to crores of Indians a reality. GST has solidified the federal financial structure and in May we collected INR 1L crore in GST revenue when most of the country saw lockdowns in some form, tax collection has become that much efficient. None of these Pit Stops were met with a very welcoming gesture from investors or public at large but the impact they have created will help propel the economic machines faster.

We are not saying that every market fall is a pit stop. As investors in India, we will obviously meet some bumps but at the end of the day if the Pit Stops we make prepare us for these bumps or repair damages from these bumps we are an economy that is racing to win.

# **Roaring India: The necessary Pit Stops before the Winning Lap**

## **India: The race ahead and the Pit Stops**

It's widely argued that Indian GDP now needs to grow at early to mid teens in the coming years to meet the target of trillion-dollar GDP addition in the targeted time. Most Economic organizations estimate a 12% kind of growth over the next year. We are not in the business of predicting or putting numbers to economic growth, what we do understand was India's growth had already slowed before Covid hit us, our lowest ever growth in the last decade was 4.8% in 2019. This was the reason of multiple Pit stop reforms we took in the previous years like GST, RERA, Bank NPA clean up, and so on.

As we move ahead of the Covid bump we are an economy geared to interact with the modern world and with more firepower than before. We have extremely resilient Banks and a financial industry where our benefit transfers are more directed and focused. Our FMCG supply chains are one of the most efficient in the world. We have a favorable demographic to take on the challenges of the modern world. But are all these enough to answer the pace of Growth Question In India?

The answer is a both Yes and No; we have done some work and probably made the economy more stable and resilient, our top businesses represented by Nifty 50 not only survived but grew in the Covid year. However, that's half the battle, we still have a lot to do as an economy and businesses in India have a lot to gain from the multitude of opportunities, that lie ahead.

India will race harder and faster than most peers, but we will keep making a few pit stops which might be temporary pains, but they are necessary for a long term sustained growth. So, stay invested and don't bet against India, the odds will always be against you.

# CONFLUENCE OF TOP PORTFOLIO MANAGERS IN INDIA



MID YEAR 3D VIRTUAL EVENT  
**COVID 19 TO  
INVESTMENTS 21**  
CONFLUENCE OF TOP 15  
PORTFOLIO MANAGERS IN INDIA



9TH & 10TH JULY, 2021

## 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.



GENUINE



VISIONARY



CREATIVE



FOCUSED



PERSISTENT

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We welcome you to this insightful experience!

## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> May 2021)

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
ValueQuest	Growth Scheme	626	13.6%	28.3%	49.8%	115.1%	36.2%	15.0%	14.5%	20.8%	18.1%	Multi Cap	Ravi Dharamshi
Karma Capital	Wealth Builder	3683	10.6%	18.5%	37.5%	112.8%	19.5%	5.7%	15.0%	15.0%	13.7%	Multi Cap	Rushab Sheth
Girik Capital	Multicap Growth	628.45	10.0%	14.2%	31.1%	66.7%	27.9%	15.2%	21.6%	22.0%	21.2%	Multi Cap	Charandeep Singh
Sundaram	SISOP	633	5.7%	8.9%	18.5%	77.3%	22.7%	14.2%	13.6%	15.1%	18.8%	Multi Cap	Madanagopal Ramu
ALFAccurate	AAA	856	7.1%	12.0%	26.5%	72.6%	21.4%	11.1%	16.0%	18.9%	19.4%	Multi Cap	Rajesh Kothari
ASK IM	IEP	16300	4.7%	10.2%	19.6%	69.3%	19.9%	13.8%	16.6%	19.3%	19.2%	Multi Cap	Sumit Jain
Quest	Flagship	855	8.3%	10.4%	26.4%	77.0%	17.9%	9.2%	14.4%	15.4%	17.4%	Multi Cap	Aniruddha Sarkar
Motilal Oswal	NTDOP	8398	6.7%	7.9%	20.3%	67.1%	14.8%	9.0%	14.7%	19.8%	15.9%	Multi Cap	Manish Sonthalia
ASK IM	Growth	2998	2.4%	8.6%	20.1%	57.4%	18.7%	11.7%	16.4%	17.1%	20.1%	Multi Cap	Chetan Thacker
Alchemy	Select Stock	3076	4.6%	10.9%	27.2%	66.0%	9.3%	7.0%	14.3%	18.3%	20.4%	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	
Care	Growth Plus Value	412	17.2%	33.0%	56.8%	140.1%	27.3%	8.8%	12.0%	22.0%	Small & Mid	Jayant Mamania	
Master Portfolio	MPSL Vallum India Discovery	506.8	6.9%	23.9%	47.3%	122.2%	31.8%	17.1%	22.5%	28.7%	Mid Cap	VCAL	
SageOne <sup>^</sup>	Core	1390	6.7%	17.3%	41.3%	116.2%	32.2%	18.0%	21.4%	30.5%	Mid & Small	Samit Vartak	
Aditya Birla	SSP	382.73	9.8%	16.3%	39.8%	100.1%	24.8%	8.9%	10.8%	14.4%	Small & Mid	Vishal Gajwani	
Basant Maheshwari	Equity	312	2.9%	11.1%	25.3%	98.7%	19.7%	16.3%	19.0%	21.4%	Multi Cap	Basant Maheshwari	
Quest	Multi	808	7.5%	11.4%	27.2%	89.5%	19.8%	10.2%	14.9%	16.0%	Multi Cap	Aniruddha Sarkar	
IIFL	Multicap	-	6.2%	8.2%	20.4%	67.0%	21.8%	20.5%	20.7%	20.2%	Multi Cap	Mitul Patel	
Ambit Capital	Good & Clean	542.05	5.0%	6.8%	22.8%	72.0%	18.1%	18.7%	18.1%	14.9%	Mid Cap	Aishvarya Dadheech	
Kotak AMC	SSV 1	840	8.1%	18.2%	40.2%	90.6%	10.8%	0.8%	7.1%	13.7%	Multi Cap	Anshul Saigal	
ICICI Pru	Flexi Cap	1030.43	7.0%	9.0%	22.1%	64.0%	18.8%	12.6%	15.2%	15.5%	Multi Cap	Anand Sharma	

- 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 500 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 SageOne<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> May 2021)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Equirus	Long Horizon	314.05	13.0%	16.4%	40.4%	144.7%	49.1%	30.3%	-	28.0%	Small & Mid	Viraj Mehta
Motilal Oswal	IOP 2	574	7.1%	15.4%	35.8%	111.1%	24.2%	10.7%	-	8.8%	Small & Mid	Manish Sonthalia
SBI	Growth With Values	-	8.0%	9.1%	30.9%	87.1%	24.7%	15.8%	-	13.9%	Multi Cap	Aparna Shanker
Kotak AMC	SSV 2	715	10.7%	23.0%	43.7%	96.0%	18.4%	7.1%	-	5.6%	Multi Cap	Anshul Saigal
ITUS Capital <sup>^</sup>	Fundamental Value	388	6.3%	9.2%	20.1%	66.0%	28.9%	22.5%	-	24.6%	Multi Cap	Naveen Chandramohan
NJAMPL	Bluechip Portfolio	574.96	8.9%	18.8%	28.6%	69.7%	26.2%	17.1%	-	17.9%	Multi Cap	Investment Committee
2Point2 Capital	Long Term Value Fund	629	6.6%	1.6%	18.3%	64.7%	16.1%	14.8%	-	19.5%	Multi Cap	Amit Mantri
Ambit Capital	CCP	690.35	9.1%	12.4%	17.9%	39.6%	24.4%	17.1%	-	21.8%	Large Cap	Manish Jain
Axis AMC	Brand Equity	1470	6.9%	6.6%	17.7%	62.5%	17.1%	10.8%	-	11.4%	Multi Cap	Trideep Bhattacharya
Varanium	Large Cap Focused	107	4.7%	9.3%	12.7%	59.3%	15.9%	12.5%	-	11.3%	Large Cap	T S Anantakrishnan

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
SageOne <sup>^</sup>	Small Cap	420	4.9%	24.1%	45.1%	141.4%	49.2%	-	-	45.4%	Small Cap	Samit Vartak
Capitalmind	Momentum	165.66	7.7%	19.2%	40.5%	99.7%	38.4%	-	-	37.0%	Multi Cap	Anoop Vijaykumar
Green Portfolio	Special	109.37	7.9%	22.8%	40.8%	90.7%	31.3%	-	-	31.2%	Multi Cap	Divam Sharma
Ambit Capital	Emerging Giants	171.29	7.6%	16.3%	29.8%	93.1%	38.4%	-	-	18.8%	Small Cap	Aishvarya Dadheech
Stallion Asset	Core Fund	309.33	4.0%	3.0%	25.8%	77.2%	34.8%	-	-	32.2%	Multi Cap	Amit Jeswani
White Oak	India Pioneers	2734	6.2%	12.1%	24.5%	70.1%	27.0%	-	-	26.6%	Multi Cap	Team White Oak
ICICI Pru	Contra	501.25	7.6%	14.1%	33.3%	71.8%	21.2%	-	-	18.6%	Multi Cap	Anand Sharma
ABSL	ISOP	556.09	8.2%	11.9%	31.3%	67.9%	25.1%	-	-	15.7%	Multi Cap	Vishal Gajwani
CapGrow	Data Growth	88.3	7.7%	9.8%	28.2%	81.3%	12.4%	-	-	14.9%	Multi Cap	Arun Malhotra
Marcellus	CCP	4338	8.6%	11.0%	16.0%	53.9%	32.3%	-	-	27.6%	Large Cap	Rakshit Ranjan

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- Data above 1Y is CAGR and upto 1Y is Absolute returns.
- ^ For ITUS & SageOne<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> May 2021)

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM( Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Alchemy	Ascent	263	4.6%	25.1%	51.0%	98.3%	-	-	-	28.3%	Multi Cap	Vikas Kumar
Marcellus	LCP	678	6.7%	16.4%	30.2%	95.5%	-	-	-	49.5%	Small Cap	Ashvin Shetty
Motilal Oswal	Focused Midcap	129	8.3%	9.4%	31.7%	97.4%	-	-	-	48.7%	Mid Cap	Rakesh Tarway
Moneylife	MAS Growth	42.14	3.6%	10.1%	20.7%	106.0%	-	-	-	51.5%	Multi Cap	Debashis Basu
ICICI Pru	PIPE	617.89	10.2%	12.0%	34.4%	99.8%	-	-	-	29.9%	Small Cap	Anand Sharma
Upside AI	Multicap	-	6.7%	16.0%	30.3%	80.9%	-	-	-	32.4%	Multi Cap	Kanika Agarrwal
TCG	\$5 Trillion Fund	-	7.3%	10.6%	27.9%	72.1%	-	-	-	22.9%	Multi Cap	Chakri Lokapriya
Helios Capital	India Rising	254.49	4.7%	4.0%	20.2%	57.4%	-	-	-	46.2%	Multi Cap	Dinshaw Irani
Carnelian	Capital Compounder	-	8.5%	12.2%	25.5%	59.3%	-	-	-	21.9%	Multi Cap	Manoj Bahety
Piper Serica	Leader Portfolio	148	1.9%	1.7%	15.3%	57.4%	-	-	-	22.6%	Multi Cap	Abhay Agarwal

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Marcellus	KCP	453.7	5.3%	1.8%	6.3%	-	-	-	-	37.5%	Sector Fund	Tej Shah
Roha Asset	Emerging Champions	-	11.2%	18.2%	56.3%	-	-	-	-	67.7%	Small & Mid	Dhiraj Sachdeva
Carnelian	Shift Strategy	-	13.8%	30.1%	58.9%	-	-	-	-	70.8%	Multi Cap	Manoj Bahety
Care	Lage & Mid Cap	-	5.3%	8.6%	15.8%	-	-	-	-	34.4%	Large & Mid	Jayant Mamania
Abakkus	Emerging Opportunities	-	14.3%	28.7%	58.0%	-	-	-	-	74.3%	Small & Mid	Sunil Singhania
Abakkus	All Cap Approach	-	10.9%	19.7%	50.3%	-	-	-	-	57.2%	Multi Cap	Sunil Singhania
Moat	Hapiness Portfolio	-	5.7%	13.4%	11.7%	-	-	-	-	23.9%	Multi Cap	Suraj Nair

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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> May 2021)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Sundaram	SELF	455	6.1%	15.6%	25.5%	92.2%	25.8%	16.9%	17.2%	19.2%	18.5%	Mid Cap
Dalal & Broacha	Long Term	390	6.8%	4.6%	14.4%	52.5%	20.1%	13.6%	14.0%	13.3%	13.6%	Multi Cap
Nine Rivers	Aurum Small Cap Opp	-	12.6%	33.5%	63.9%	201.4%	35.3%	16.6%	17.2%	-	31.4%	Small Cap
ValueQuest	Platinum Scheme	120.94	10.0%	20.5%	55.3%	124.9%	45.9%	24.0%	20.1%	-	19.8%	Multi Cap
TCG	Multicap	-	9.6%	8.3%	34.2%	85.5%	20.8%	18.0%	26.5%	-	24.6%	Multi Cap
Emkay	Capital Builder	-	7.6%	8.2%	19.9%	69.6%	13.5%	7.7%	11.2%	-	15.4%	Multi Cap
NJAMPL	Multicap	124.4	3.2%	17.4%	30.0%	67.8%	24.4%	5.3%	-	-	10.4%	Multi Cap
QRC	Long Term	<50	7.7%	10.3%	21.7%	60.9%	18.0%	11.8%	-	-	11.5%	Mid & Small
NAFA Asset	Small Cap	-	6.8%	15.1%	37.0%	115.3%	29.2%	-	-	-	26.2%	Small Cap
CapGrow	Special	-	9.1%	15.1%	32.3%	112.6%	21.3%	-	-	-	19.3%	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.
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- All data is as shared by respective AMC and is as TWRR guidelines.
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We Offer

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## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> May 2021)

### Peer Group 8: Best as per May 2021 Performance

Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Care	Growth Plus Value	412	17.2%	33.0%	56.8%	140.1%	27.3%	8.8%	12.0%	-	22.0%	Small & Mid
Abakkus	Emerging Opportunities	-	14.3%	28.7%	58.0%	-	-	-	-	-	74.3%	Small & Mid
Carnelian	Shift Strategy	-	13.8%	30.1%	58.9%	-	-	-	-	-	70.8%	Multi Cap
ValueQuest	Growth Scheme	626	13.6%	28.3%	49.8%	115.1%	36.2%	15.0%	14.5%	20.8%	18.1%	Multi Cap
Kotak AMC	Small & Midcap	36	13.1%	19.8%	38.6%	116.0%	21.0%	9.2%	15.1%	-	17.6%	Small & Mid
Equirus	Long Horizon	314.05	13.0%	16.4%	40.4%	144.7%	49.1%	30.3%	-	-	28.02%	Small & Mid
Nine Rivers	Aurum Small Cap Opp	-	12.6%	33.5%	63.9%	201.4%	35.3%	16.6%	17.2%	-	31.4%	Small Cap
Moat	Mid & Smallcap	-	11.8%	18.2%	-	-	-	-	-	-	31.6%	Small & Mid
Edelweiss	Focused Small Cap	144	11.6%	18.8%	47.1%	107.6%	26.7%	9.8%	12.0%	-	9.6%	Small & Mid
Roha Asset	Emerging Champions	-	11.2%	18.2%	56.3%	-	-	-	-	-	67.7%	Small & Mid

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	6.5%	7.3%	20.2%	62.7%	14.3%	13.2%	13.7%	12.8%	Large Cap
Nifty 500	7.0%	8.6%	23.4%	69.1%	16.1%	12.4%	14.2%	11.4%	Multi Cap
Nifty Mid Cap 100	6.5%	10.8%	30.7%	94.2%	19.8%	10.9%	14.2%	18.1%	Mid Cap
Nifty Small Cap 100	8.2%	15.1%	41.0%	131.5%	18.9%	5.8%	12.2%	-	Small Cap

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- Min AUM in 10-year peer group is taken at 500 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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MUMBAI 400062

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