



PMS AIF WORLD
High Performance Investing

MAY, 2024 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
MAY, 2024

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Are markets at a turning point from extreme greed to extreme fear?

Dear Investors,



Kamal Manocha

Founder & CEO

The last four years have seen massive wealth creation, with almost all clients we serve making good returns. Since the beginning of the new FY, some investors are concerned, prompting the obvious question: **Are markets at a turning point from extreme greed to extreme fear?** Let's explore this in our newsletter. But first, let us remember one of the greatest investors, **Jim Simons**, who passed away at the age of 86 on May 10, 2024. Born in 1938 and holding a PhD in mathematics, he is renowned for mastering the equity markets through quantitative investing, delivering over 60% returns for more than three decades.

Here are five principles Jim Simons lived by:

"Be guided by beauty. Just as a great theorem can be very beautiful, a company that's really working very well, very efficiently, that can be beautiful.

Surround yourself with the smartest and best people you possibly can. Let them do their thing. Don't sit on top of them. If they're smarter than you, all the better.

Do something original. Don't run with the pack. If everyone is trying to solve the same problem... don't do that.

Don't give up easily. Stick with it. Stick with it not forever, but really give it a chance to get where you're going.

The final principle is hope for good luck. That's the most important principle."



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Are markets at a turning point from extreme greed to extreme fear?

Now, let's delve into the question related to the fear of correction based on the rise in indices, especially in the mid & small caps.

The current bull market in India has been ongoing since 2019, and the COVID fall was merely an opportunity to invest because many reforms have taken place, and there is a massive shift in the economic dynamics, which led to a rise in earnings across states, industries, sectors, and businesses. Unlike the last bull run, which was narrow and large-cap biased, this time, it is holistic, which is why mid & small caps have performed better. And all this is backed by growth in earnings. So, too much fear is detrimental to investing. Let's see the numbers below.

While the Nifty index has grown in value from 12k to 22k, the earnings of companies within have more than doubled. Nifty 50 earnings as of March 2020 stood at approximately Rs 3 lakh cr. And the earnings of the remaining 450 companies in the top 500 stood at Rs 60,000 crores.

As of March 2024, Nifty 50 earnings have doubled, but the remaining 450 companies have seen a skyrocketing earnings growth to Rs 6 lakh crores—a 10x increase!

Stating below the data of expected growth in earnings of Nifty 50 vs Nifty 500 indices.

DESCRIPTION	MARCH 2020	MARCH 2024 (estimated)*
Nifty 50 Companies' Earnings	Rs 3 lakh crores	Rs 7-8 lakh crores
Nifty 450 companies	Rs 60 k crores	Rs 6 lac crores
Nifty 500 Companies' Earnings	Rs 3.60 lakh crores	Rs 14 lakh crores



Markets & Data at a glance

DOMESTIC INDICES	
INDICES	1M Change*
SENSEX	+ 1.13%
NIFTY 50	+ 1.24%
NIFTY BANK	+ 4.82%
NIFTY MIDCAP 100	+ 5.81%
NIFTY SMALLCAP 100	+ 11.40%

*Data as of 30th April 2024

GLOBAL INDICES	
INDICES	1M Change*
DOW JONES	- 5.00%
NASDAQ 100	- 4.46%
S&P 500	- 4.16%
SHANGAI COMPOSITE	+ 2.09%
NIKKEI 225	- 4.86%

*Data as of 30th April 2024

FII & DII ACTIVITY^	
FIIs (Equity)	- Rs 35,692.19 Cr
DIIs (Equity)	+ Rs 44,186.28 Cr

^Net Data, as per CM Provisional Data, 1M change as of April 2024

PRICE-TO-EARNINGS (PE) RATIO	
NIFTY 50	21.6
NIFTY 500	24.2
NIFTY MIDCAP 100	34.0
NIFTY SMALLCAP 100	26.3

MARKET CAP to GDP RATIO^	~98%
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^Buffett Indicator as of 8th May 2024



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Performance of Domestic Markets

Index	As on 30/04/2024	1M	3M	6M	1Y
Nifty 50	22,604.90	1.24%	4.05%	18.48%	25.13%
Nifty Next 50	64,900.50	7.05%	17.36%	47.44%	64.25%
Nifty Mid Cap 150	18,893.00	6.34%	5.64%	29.70%	58.19%
Nifty Small Cap 250	15,833.40	10.49%	5.11%	31.68%	68.57%
Nifty Micro Cap 250	20,964.80	10.58%	2.26%	29.67%	86.82%
Nifty 500	20,997.20	3.66%	6.04%	24.98%	37.96%

Sector	As on 30/04/2024	1M	3M	6M	1Y
Auto	22,479.90	4.95%	16.92%	41.24%	70.44%
Bank	49,396.80	4.82%	7.39%	15.29%	14.25%
Consumer Durables	34,630.10	7.09%	10.04%	23.41%	42.65%
Energy	40,366.70	3.45%	9.85%	50.71%	70.08%
FMCG	54,240.60	0.54%	-1.51%	5.81%	13.44%
Healthcare	11,974.50	-0.70%	4.84%	29.38%	49.43%
IT	33,201.00	-4.86%	-9.38%	8.56%	19.82%
Metal	9,175.80	11.12%	15.08%	42.21%	58.22%
Realty	973.3	8.06%	13.67%	61.40%	118.66%



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We always strive to make investors optimistic, as this is the starting point of wealth creation through equity investments.

We also declutter investors' concerns through objective evaluation of markets and assure you of the best investment services, backed by in-depth knowledge, driven by content, and analytics.

At PMS AIF WORLD, we understand the gravity of investment decisions, **so we offer a well-informed experience and bespoke Wealth Management Services.**

We are a New Age Investment Services Company, committed to delivering an analytics-driven, high-quality investing experience.

Our mission is to foster Wealth Creation and Prosperity for our clients.

We are driven by a dedication to excellence and meticulously offer the best Alpha-focused products.

Our suite of investment products spans a diverse range from listed to unlisted, encompassing Pre-IPO, Private Equity, and Venture Capital funds.

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Top 10 Portfolios In Each Peer Group (Data as of 30th April 2024)

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
Nine Rivers capital	Aurum Small Cap	629.43	8.7%	2.6%	14.0%	61.4%	31.6%	28.1%	28.6%	26.5%	29.4%	Small Cap	Sandeep Daga
AccuraCap	PicoPower	675.47	8.9%	7.0%	27.1%	64.8%	25.1%	25.3%	29.5%	24.2%	24.6%	Small Cap	Raman Nagpal
Girik Capital	Multicap	1349.14	8.2%	7.6%	30.1%	71.5%	29.6%	25.4%	24.8%	23.8%	21.5%	Multi Cap	Charandeep Singh
ValueQuest	Growth Scheme	1495	6.4%	7.1%	15.5%	53.4%	25.7%	27.0%	27.5%	20.6%	19.0%	Multi Cap	Sameer Shah
Care PMS	Growth Plus Value	750	11.4%	1.3%	16.4%	54.9%	19.1%	30.5%	26.0%	20.8%	22.6%	Mid & Small	Jayant Mamania
Motilal Oswal AMC	Value Migration	2174	5.7%	7.0%	27.5%	61.6%	28.9%	21.8%	18.5%	15.5%	20.2%	Multi Cap	Vaibhav Agrawal
ICICI Prudential PMS	Growth Leaders Strategy	1365.3	5.8%	11.2%	34.5%	50.5%	26.6%	24.2%	21.1%	17.5%	12.8%	Multi Cap	Anand Shah
AlfAccurate Advisors	IOP	1532.29	5.9%	7.8%	24.5%	38.5%	21.7%	20.2%	19.5%	19.8%	19.1%	Multi Cap	Rajesh Kothari
Alchemy Capital Management	High Growth Select Stock	4063	4.0%	9.5%	27.1%	48.9%	19.8%	22.7%	16.5%	19.3%	20.6%	Multi Cap	Hiren Ved
360 ONE	Multicap	-	5.5%	7.8%	22.5%	33.5%	18.3%	18.1%	17.8%	16.4%	23.0%	Multi Cap	Anup Maheshwari
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	3780	10.4%	11.7%	37.8%	72.0%	24.3%	24.2%	27.4%	28.4%	Mid & Small	Samit Vartak	
Green Lantern Capital LLP	Growth Fund	539.42	17.7%	20.6%	57.2%	128.1%	68.5%	60.7%	42.9%	27.9%	Mid & Small	Abhishek Bhardwaj	
Stallion Asset	Core Fund	1635.95	7.8%	15.2%	38.7%	87.6%	39.4%	30.1%	32.2%	30.7%	Multi Cap	Amiit Jeswani	
Samvitti Capital	Aggressive Growth	291.7	11.9%	10.6%	38.9%	94.0%	42.2%	30.0%	22.7%	16.7%	Multi Cap	Prabhakar Kudva	
Equitree Capital	Emerging Opportunities	273.21	14.7%	0.5%	24.0%	93.5%	39.5%	39.4%	22.4%	6.3%	Small Cap	Pawan Bharaddia	
Capitalmind	Adaptive Momentum	868.94	3.8%	0.0%	40.8%	70.3%	27.0%	25.3%	28.9%	28.3%	Multi Cap	Anoop Vijaykumar	
Negen Capital	Special Situations Fund	854.59	14.2%	4.2%	26.4%	66.0%	27.6%	33.4%	31.9%	19.4%	Multi Cap	Neil Bahal	
Sameeksha Capital	Equity Fund	1301.95	6.2%	5.8%	23.4%	61.2%	33.2%	28.2%	31.4%	24.1%	Multi Cap	Bhavin Shah	
ValueQuest	Platinum Scheme	1885	7.3%	11.5%	19.9%	58.7%	26.7%	29.1%	32.9%	21.6%	Multi Cap	Ravi Dharamshi	
ICICI Prudential PMS	Contra Strategy	6164.3	5.7%	9.6%	32.9%	52.8%	32.1%	29.4%	25.0%	23.0%	Multi Cap	Anand Shah	

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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 30th April 2024)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Samvitti Capital	Active Alpha Multicap	235.3	15.3%	14.6%	38.1%	113.5%	58.9%	44.4%		45.5%	Multi Cap	Prabhakar Kudva
Carnelian Capital	Shift	1730	8.5%	5.8%	26.2%	72.4%	38.6%	37.0%	-	46.0%	Mid & Small	Manoj Bahety
Invasset LLP	Growth Fund	257.24	2.7%	-3.0%	34.9%	109.9%	47.2%	32.4%	-	40.3%	Multi Cap	Anirudh Garg
Roha Asset Managers	Emerging Champions	-	11.2%	9.3%	28.9%	80.3%	34.2%	37.4%	-	46.3%	Mid & Small	Dhiraj Sachdev
Green Portfolio	Super 30	124.95	12.0%	-3.0%	14.9%	44.7%	25.9%	55.8%	-	33.5%	Mid & Small	Divam Sharma
Electrum	Laureate Portfolio	-	11.2%	5.4%	17.5%	61.1%	29.2%	36.8%	-	41.5%	Mid & Small	Romil Jain
ICICI Prudential PMS	PIPE Strategy	5329.7	9.1%	4.7%	25.0%	64.3%	35.7%	38.2%	-	33.1%	Small Cap	Anand Shah
AlfAccurate Advisors	Budding Beasts	292.44	8.6%	4.7%	21.2%	50.2%	30.7%	31.4%	-	31.7%	Mid & Small	Rajesh Kothari
Abakkus Asset Manager	Emerging Opportunities	3338	9.6%	5.7%	17.8%	54.9%	25.4%	29.5%	-	38.5%	Mid & Small	Sunil Singhania
Vallum Capital Advisors	India Discovery Strategy	1505.5	9.1%	3.3%	24.3%	49.1%	28.2%	25.9%	-	32.2%	Mid & Small	Manish Bhandari
Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Carnelian Capital	YnG Strategy	-	5.1%	4.8%	49.6%	90.0%	50.0%	-	-	45.9%	Multi Cap	Manoj Bahety
Motilal Oswal AMC	Multifactor Equity PMS	-	3.7%	4.9%	40.6%	77.5%	33.1%	-	-	26.0%	Multi Cap	Sankar Krishnan
Ckredence Wealth	Diversified	254	6.2%	1.9%	25.1%	56.4%	31.6%	-	-	24.7%	Multi Cap	Kartik Mehta
Motilal Oswal AMC	Ethical PMS	56	3.7%	7.7%	34.1%	56.9%	27.0%	-	-	20.5%	Multi Cap	Vaibhav Agrawal
Ckredence Wealth	All Weather	224	4.8%	3.4%	24.0%	48.9%	28.6%	-	-	19.9%	Multi Cap	Kartik Mehta
ValueQuest	Poise Scheme	54.83	3.0%	-0.8%	2.0%	39.8%	29.4%	-	-	27.2%	Multi Cap	Ravi Goenka
SBI	Aeon Alpha PMS	460	9.8%	6.7%	17.8%	43.8%	25.4%	-	-	20.8%	Multi Cap	Gaurav Mehta
UNIFI	BCAD2: Breakout 20	-	5.5%	4.6%	19.1%	41.1%	22.8%	-	-	20.4%	Multi Cap	Sarath K. Reddy
Pace 360	Tresor Flexi	128	5.2%	10.9%	17.8%	24.5%	17.8%	-	-	16.5%	Multi Asset	Amit Goel
Ambit	TenX Portfolio	175.68	4.5%	3.4%	9.2%	27.5%	16.6%	-	-	12.3%	Mid & Small	Trilok Agarwal

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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 30th April 2024)

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Valtrust Partners LLP	Valtrust Momentum	-	8.7%	10.2%	47.8%	91.1%	-	-	-	69.4%	Multi Cap	Vishal Khatri
Investsavvy	Alpha Fund	-	17.7%	12.1%	39.5%	109.1%	-	-	-	56.4%	Multi Cap	Ashish Goel
BugleRock Capital	Special Situations	-	10.3%	9.8%	35.5%	78.6%	-	-	-	61.2%	Small Cap	Himanshu Upadhyay
Motilal Oswal AMC	Founders	1114	5.4%	7.9%	27.9%	60.7%	-	-	-	61.2%	Multi Cap	Vaibhav Agrawal
Marathon Trends	Trend Following	-	2.8%	6.6%	26.8%	57.7%	-	-	-	58.2%	Multi Cap	Atul Suri
Maximal Capital	Pathfinder Value Fund	104	11.9%	1.9%	23.8%	72.3%	-	-	-	45.8%	Multi Cap	Sarvesh Gupta
Valcreate	IME Digital Disruption	-	5.9%	8.7%	26.0%	54.1%	-	-	-	49.7%	Thematic	Ashi Anand
Bonanza	Aegis	17.67	7.8%	2.2%	26.1%	56.6%	-	-	-	35.3%	Multi Cap	Team Bonanza
Valcreate	Concentrated Microtrends	-	5.3%	6.9%	27.6%	44.4%	-	-	-	40.3%	Large & Mid	Ashi Anand
Fractal Capital Investments	FCI LLP Opportunities	-	5.3%	4.5%	20.0%	46.0%	-	-	-	32.5%	Multi Cap	Miten Lathia
Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Prabhudas Liladher	Aqua Strategy	247	3.0%	0.4%	31.1%	-	-	-	-	57.8%	Multi Cap	Siddharth Vora
Wryght Research & Capital	Wright Factor Fund	80.1	7.4%	6.8%	44.5%	-	-	-	-	57.3%	Multi Cap	Sonam Srivastava
Sowilo	Target Return Aggressive Fund	42.1	15.5%	8.4%	28.4%	-	-	-	-	40.4%	Mid & Small	Sandip Agarwal
Sowilo Investment	Multicap Fund	62.69	10.2%	4.4%	27.1%	-	-	-	-	40.3%	Multi Cap	Sandip Agarwal
Alchemy Capital Management	Smart Alpha 250	-	9.0%	8.9%	39.0%	-	-	-	-	40.3%	Multi Cap	Alok Agarwal
Wryght Research & Capital	Wright Alpha Fund	28.8	5.5%	-8.1%	26.9%	-	-	-	-	36.7%	Multi Cap	Sonam Srivastava
Wryght Research & Capital	Wright Factor Fund - Hedged	17.5	5.8%	1.6%	27.8%	-	-	-	-	30.9%	Multi Cap	Sonam Srivastava
East Green PMS	Agile Strategy	41	6.3%	3.6%	18.6%	-	-	-	-	27.3%	Multi Cap	Vinay Arya
Alchemy Capital Management	Alpha 100	-	0.7%	6.9%	25.4%	-	-	-	-	26.2%	Large Cap	Alok Agarwal

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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 30th April 2024)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
ICICI Prudential PMS	Value Strategy	373.8	7.5%	10.4%	39.7%	71.3%	41.7%	36.0%	25.7%	21.2%	13.8%	Multi Cap
Master Trust	India Growth Strategy	531.417	8.6%	3.4%	24.3%	44.4%	25.4%	26.1%	27.5%	29.6%	27.6%	Mid & Small
Bonanza	Value	25.05	6.8%	5.4%	43.0%	83.9%	33.9%	25.8%	25.3%	21.5%	22.8%	Multi Cap
Right Horizons	Super Value	-	9.6%	4.7%	15.6%	48.5%	23.5%	30.5%	27.8%	19.9%	18.1%	Mid & Small
Aditya Birla Capital	Select Sector Portfolio	305	6.4%	9.2%	26.5%	49.4%	27.5%	26.6%	23.3%	21.1%	17.1%	Multi Cap
ICICI Prudential PMS	Largecap Strategy	262.5	5.0%	12.7%	37.6%	52.7%	29.2%	25.6%	21.2%	17.2%	17.2%	Large Cap
Asit C Mehta	Ace Multicap	106.65	8.2%	4.6%	51.2%	101.4%	54.4%	43.9%	29.8%	-	24.6%	Multi Cap
Estee Advisors	Long Alpha	45	5.9%	2.1%	34.4%	73.7%	31.8%	29.3%	33.2%	-	25.3%	Multi Cap
ABANS	Growth & Momentum	-	8.7%	6.1%	19.1%	41.7%	22.3%	20.9%	24.1%	22.3%	23.7%	Multi Cap
Green Lantern Capital LLP	Alpha Fund	27.61	8.8%	11.1%	43.5%	90.7%	48.3%	40.1%	-	-	41.7%	Large & Mid

- 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 200 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filter for less than 2Y.
- All data is as shared by respective AMC and is as TWRR guidelines.
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Top 10 Portfolios In Each Peer Group (Data as of 30th April 2024)

Peer Group 8: Best as per April 2024 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Incred AMC	Small Cap Portfolio	-	20.1%	9.0%	19.4%	50.4%	31.8%	-	-	-	19.0%	Small Cap
Investsavvy	Alpha Fund	-	17.7%	12.1%	39.5%	109.1%	-	-	-	-	56.4%	Multi Cap
Green Lantern Capital LLP	Growth Fund	539.42	17.7%	20.6%	57.2%	128.1%	68.5%	60.7%	42.9%	-	27.9%	Mid & Small
Incred PMS	Multicap Portfolio	-	17.0%	10.4%	23.4%	59.4%	29.4%	22.0%	-	-	20.4%	Multi Cap
KRIIS	Multi Cap Advantage PMS	132.5	16.8%	18.2%	28.1%	57.3%	26.5%	24.8%	-	-	25.3%	Multi Cap
Centrum	Microcap	-	16.0%	9.5%	25.0%	48.8%	29.6%	28.7%	28.8%	-	19.4%	Small Cap
Sowilo Investment Managers LLP	Target Return Aggressive Fund	42.1	15.5%	8.4%	28.4%	-	-	-	-	-	40.4%	Mid & Small
Samvitti Capital	Active Alpha Multicap	235.3	15.3%	14.6%	38.1%	113.5%	58.9%	44.4%			45.5%	Multi Cap
AccuraCap	Dynamo	-	14.8%	4.8%	34.6%	81.8%	37.9%	33.8%	31.3%	-	26.6%	Small Cap
Equitree Capital Advisors	Emerging Opportunities	273.21	14.7%	0.5%	24.0%	93.5%	39.5%	39.4%	22.4%	-	6.3%	Small Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	1.2%	4.2%	18.8%	26.5%	16.3%	16.9%	15.3%	14.3%
BSE 500 TRI	3.4%	6.1%	25.0%	38.6%	20.2%	20.4%	18.2%	16.3%

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KOLKATA - 700020

BENGALURU

ADARSH PALM RETREAT,
PHASE 3,
BANGALORE 560103

MUMBAI

ZION BUILDING
SECTOR 10 KHARGAR,
NAVI MUMBAI 410210

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