



PMS AIF WORLD

March, 2026 PMS Newsletter

## The Alpha Report

A thoughtful view of Performance.



Monthly Performance Report

# The Pursuit of Meaningful Alpha

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Alpha is never a shortcut. It is the reward for disciplined research, concentrated conviction, and the patience to let time reveal truth. Only a small fraction of managers generate real, repeatable alpha because consistent outperformance demands fewer mistakes, deeper insights, and the courage to hold when markets test resolve.

Selection, therefore, becomes everything. Less than 15% of funds deliver long-term alpha, which makes choosing founder-led, research-driven managers with genuine Quality–Risk–Consistency the most important decision an investor makes.

And meaningful alpha is no longer confined to listed equities alone. It increasingly emerges in places where markets are less efficient — special situations, value pockets, pre-IPO opportunities, mid-stage PE, and early-stage VC. Even within listed equities, pure small-cap with high concentration remains the toughest arena: barely 5% of managers outperform meaningfully, as diversified structures and small-cap indices often match them.

All of this is why PMS AIF World exists. Our clients experience meaningful alpha because we keep them long-term oriented, evaluate a wide universe of managers objectively through our proprietary framework, and curate opportunities across public and private alternatives with deep knowledge and clarity.

This newsletter reflects that philosophy. Instead of dumping data, we reveal alpha thoughtfully — by category, by AUM band, by consistency — to highlight where true skill resides and where real wealth creation happens.



### The World Belongs to Optimists

*"The future is rarely built by those who expect the worst. It is built by those who continue to believe in possibility."*

Every market cycle brings moments when uncertainty feels overwhelming. Headlines turn negative, volatility rises and investor confidence is tested. Yet history repeatedly shows that such phases often become the foundation for the next wave of wealth creation.

### Asset Class Returns Snapshot

Asset Class	2021	2022	2023	2024	2025
Equity	26%	6%	21%	10%	12%
Debt	4%	4%	7%	8%	8%
Gold	-4%	0%	14%	27%	71%
Silver	-13%	4%	-1%	22%	158%
Office REITs	13%	6%	5%	22%	31%

In investing, growth intelligence matters, but emotional intelligence matters more. Over the years, markets have repeatedly shown that behavioural discipline is often more valuable than intellectual conviction. Investors say one should learn from history, yet flows continue to chase the rear-view mirror. Consider precious metals. In 2023, when gold and silver were not the fashionable trades, inflows were modest, with roughly ₹650 crore into gold and ₹700 crore into silver. Today, in 2026, gold SIP flows are around ₹24,000 crore and silver around ₹9,000 crore, and for the first time in mutual fund history, gold flows are approaching equity-like SIP scale. The same pattern played out in small caps as well. After a muted phase in which the category delivered only about 8% annualised returns over the preceding two years, net flows were negative in 2020, reflecting low investor interest when returns were unexciting. By 2024, however, after performance had already strengthened sharply, inflows into small caps rose to their highest levels. The message is clear: investors often allocate more when confidence is high and recent returns feel reassuring, rather than when valuations and forward return potential may be more attractive.

## CEO's Note

Mr. Kamal Manocha



### The World Belongs to Optimists

The table above captures this clearly. Leadership across asset classes changes sharply from one phase to another. Equity led in 2021 and 2023, while gold, silver and Office REITs have each had their own periods of strong outperformance. What feels safe or attractive at any given moment is often shaped more by recent returns than by future opportunity. This is precisely why emotional discipline matters so much. Investors are often tempted to allocate more only after an asset class has already run up, rather than when valuations, sentiment and positioning are more favourable.

We understand that for many, recent months have felt like navigating a storm without a lighthouse. Watching hard-earned capital erode during sudden drawdowns is a profound test of patience. Yet, it is in these moments of maximum discomfort that future wealth is often founded. The Indian growth story, anchored by a disciplined central bank and a historic capex cycle, remains one of the most compelling secular narratives available. While global liquidity remains tight, India's macro fundamentals provide a buffer that is often overlooked in the heat of the moment. This period of consolidation has anchored valuations, offering a safer starting point for those with the discipline to look beyond the immediate red on the screen.

At PMS AIF World, we remain guided by the belief that enduring wealth is built through Quality, Risk, and Consistency. As custodians of your assets, our responsibility is to help you look beyond short-term volatility and remain aligned with long-term opportunity. Through our proprietary 5-P Analysis, we assess managers and strategies with a sharp focus on suitability, capital protection, and sustainable wealth creation. If the current phase is creating questions around portfolio positioning, it may also be creating opportunities. For investors with patience and perspective, this could be a meaningful time to review allocations and consider strengthening equity exposure in a disciplined manner. Our team would be happy to help you assess the right path forward.

## Domestic Indices – 1M Change

Sensex  
81,287.19

- 1.19%

Nifty 50  
25,178.65

- 0.56%

Nifty Bank  
60,529.00

+ 1.54%

Nifty Midcap 100  
59,115.6

+ 1.17%

Nifty Smallcap 100  
16,928.9

+ 0.30%

Data as of  
28th Feb, 2026

## International Indices – 1M Change

Dow Jones  
48,977.92

+ 0.17%

Nasdaq 100  
2,4960.04

- 2.31%

S&P 500  
6,878.88

- 0.88%

SSE Composite Index  
4,162.8800

+ 1.09%

NIKKEI 225  
58,850.27

+ 10.36%

Data as of  
28th Feb, 2026

## Commodity – 1M Change

Crude Oil  
\$67.02

+ 2.78%

Gold  
\$5,278.10

+ 8.02%

Silver  
\$93.817

+ 10.85%

Data as of  
28th Feb, 2026

## Nifty Indices – 1M & 1Y Change

Infrastructure (+) 4.15%	+ 24.36%	Pharmaceuticals (+) 5.70%	+ 15.84%
Public Sector Banks (+) 8.88%	+ 73.75%	Private Sector Banks (+) 0.23%	+ 18.13%
Automobile (+) 5.27%	+ 37.37%	Metal (+) 3.49%	+ 48.93%
FMCG (-) 0.14%	+ 0.89%	Consumption (-) 0.59%	+ 13.55%
		1M - X.XX%	1Y - XX.XX%

## Price-to-Earnings (PE) Ratio

Nifty 50	22.0	Nifty 100	21.6
Nifty Midcap 100	32.9	Nifty SmallCap 100	30.1

## Key Macro Indicators

10 Year Bond Yield	6.66%	Inflation	3.30%
Unemployment (CMEI)	6.85%	Mcap to GDP	1.3x



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

2,200+

AUM (in Cr)

400+

PMSs listed

10+

Countries

23+

Cities

100+

AIFs listed

## Monthly Performance Leaderboard

Nirmal Bang Equity Multi Cap	Multi Cap & Flexi Cap	+ 11.21%
Purnartha Pratham Strategy	Multi Cap & Flexi Cap	+ 9.64%
Purnartha Vision Strategy	Multi Cap & Flexi Cap	+ 8.74%
Motilal Oswal Ethical Strategy	Multi Cap & Flexi Cap	+ 8.35%
Emkay Investment ENVI	Multi Cap & Flexi Cap	+ 7.66%
Capital 8 Infinity Fund	Multi Cap & Flexi Cap	+ 7.56%
Sundaram Alternate SISOP	Multi Cap & Flexi Cap	+ 7.43%
Axis Securities Kaizen	Mid & Large Cap	+ 7.06%
Sundaram Alternate SELF	Mid Cap	+ 6.92%
Sundaram Alternate VOYAGER	Multi Cap & Flexi Cap	+ 6.64%

## Indices – 1M Change

BSE 500 TRI	Multi Cap & Flexi Cap	+ 0.45%
Nifty 50 TRI	Large Cap	- 0.51%

# Mid & Small Cap PMS — Ranked by Alpha

## 1 – Year Alpha

Name	1Y	Benchmark 1Y**	Alpha 1Y	3Y	5Y	Since Inception
Shriram Asset Future GEMS	51.87%	20.13%	31.74%	-	-	46.00%
Sundaram Alternate SELF	35.79%	20.13%	15.66%	22.62%	17.32%	17.35%
Trivantage Capital Small and Midcap Financials.	35.32%	20.13%	15.19%	19.10%	-	19.10%
Invesco Asset RISE	31.43%	20.13%	11.30%	23.12%	16.94%	14.30%
Alchemy Capital Smart Alpha 250	28.94%	20.13%	8.81%	-	-	20.31%

## 3 – Year Alpha

Name	1Y	3Y	Benchmark 3Y**	Alpha 3Y	5Y	Since Inception
Green Lantern Growth Fund	11.89%	41.44%	23.12%	18.32%	38.99%	22.86%
Wallfort Diversified Fund.	14.62%	40.41%	23.12%	17.29%	30.90%	21.67%
Wallfort Avenue Fund.	26.26%	34.15%	23.12%	11.03%	-	24.56%
Green Lantern Alpha Fund	20.41%	33.00%	23.12%	9.88%	27.02%	31.00%
Asit C Mehta Ace Ten Trillion Opportunities	15.62%	28.33%	23.12%	5.21%	23.41%	16.94%

## 5 – Year Alpha

Name	1Y	3Y	5Y	Benchmark 5Y**	Alpha 5Y	Since Inception
Green Lantern Growth Fund	11.89%	41.44%	38.99%	19.28%	19.71%	22.86%
Wallfort Diversified Fund	14.62%	40.41%	30.90%	19.28%	11.62%	21.67%
MoneyBee Securities QueenBee	-8.29%	19.49%	30.13%	19.28%	10.85%	18.95%
Carnelian Shift Strategy	13.19%	27.57%	27.22%	19.28%	7.94%	31.42%
Green Lantern Alpha Fund	20.41%	33.00%	27.02%	19.28%	7.74%	31.00%

\*\* Benchmark: Nifty Mid Small 400, for Mid & Small Strategies

# Small Cap PMS — Ranked by Alpha

## 1-Year Alpha

Name	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Since Inception
Aequitas India Opportunities	61.81%	15.16%	46.65%	51.51%	46.55%	34.16%
Sundaram Alternate Rising Stars	36.19%	15.16%	21.03%	15.73%	16.84%	14.18%
Equirus Long Horizon Fund	17.22%	15%	2.06%	17.45%	13.89%	19.11%
Alchemy Smart Alpha Micro and Small Cap.	14.61%	15%	-0.55%	-	-	6.02%
Accuracap Dynamo	13.31%	15.16%	-1.85%	29.70%	23.64%	22.14%

## 3-Year Alpha

Name	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Since Inception
Aequitas India Opportunities Product	61.81%	51.51%	22.74%	28.77%	46.55%	34.16%
Equitree Emerging Opportunities	-5.29%	31.20%	22.74%	8.46%	25.07%	5.85%
Accuracap Dynamo	13.31%	29.70%	22.74%	6.96%	23.64%	22.14%
Seers Enduring Portfolio	11.43%	24.71%	22.74%	1.97%	34.80%	20.49%
Counter Cyclical Diversified Long Term Value	-0.23%	22.77%	22.74%	0.03%	37.38%	44.37%

## 5-Year Alpha

Name	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Since Inception
Aequitas India Opportunities Product	61.81%	34.43%	51.51%	46.55%	16.03%	30.52%
Counter Cyclical Diversified Long Term Value	-0.23%	5.84%	22.77%	37.38%	16.03%	21.35%
Equitree Emerging Opportunities	-5.29%	8.12%	31.20%	25.07%	16.03%	9.04%
Accuracap Dynamo	13.31%	6.07%	29.70%	23.64%	16.03%	7.61%
Valentis Rising Star Opportunity	12.52%	0.98%	14.81%	18.68%	16.03%	2.65%

\*\*Benchmark: Nifty Small Cap 250 for Small Cap focused strategies

# Multi Cap PMS — Ranked by Alpha

## 1-Year Alpha

Name	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Since Inception
Alchemy High Growth	46.81%	16.06%	30.75%	21.31%	15.24%	20.37%
Qode All Weather	46.35%	16.06%	30.29%	-	-	31.77%
Turtle Wealth Growth Mantra	41.22%	16.06%	25.16%	24.38%	14.30%	15.71%
Carnelian Capital Compounder	37.70%	16.06%	21.64%	26.97%	19.71%	19.11%
Sundaram Alternate SISOP	35.09%	16.06%	19.03%	24.15%	17.47%	18.06%

## 3-Year Alpha

Name	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Since Inception
Invasset Growth Pro Max	11.3%	36.7%	16.3%	20.4%	24.6%	28.0%
Stallion Asset Core Fund	14.3%	36.1%	16.3%	19.8%	23.1%	26.7%
White Pine India Emerging Stars	22.6%	35.2%	16.3%	18.9%	-	32.8%
Asit C Mehta ACE Multicap	19.1%	32.9%	16.3%	16.6%	25.9%	18.9%
Carnelian Contra Strategy	21.5%	32.7%	16.3%	16.4%	-	27.1%

## 5-Year Alpha

Name	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Since Inception
Asit C Mehta ACE Multicap	19.13%	32.91%	25.89%	13.40%	12.49%	18.88%
ICICI Prudential Value Strategy	31.06%	30.11%	25.63%	13.40%	12.23%	13.42%
Invasset Growth Pro Max	11.29%	36.66%	24.62%	13.40%	11.22%	28.01%
Buoyant Capital Opportunities	30.13%	26.11%	24.23%	13.40%	10.83%	21.70%
Negen Special Situations	11.30%	26.05%	24.04%	13.40%	10.64%	16.29%

\*\*Benchmark: BSE 500 TRI for Multi Cap and Flexi Cap strategies

# Alpha Rankings by AUM Category (100 -1000 Cr.)

## 1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Since Inception
Qode All Weather	146.92	46.35%	15.07%	31.28%	-	-	31.77%
Alchemy High Growth	755.02	46.81%	17.30%	29.51%	21.31%	15.24%	20.37%
Dalal & Broacha Aggressive Long Term Capital Appreciation	174.17	42.85%	15.07%	27.78%	29.00%	23.67%	13.41%
Alchemy WIN Strategy	124	43.51%	17.30%	26.21%	-	-	16.73%
Turtle Wealth Growth Mantra Fund	136.85	41.22%	17.30%	23.92%	24.38%	14.30%	15.71%

## 3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Since Inception
White Pine India Emerging Stars Approach	378.89	22.56%	35.19%	12.28%	22.91%	-	32.84%
Wallfort Diversified PMS	379.21	14.62%	40.41%	17.67%	22.74%	30.90%	21.67%
Wealth Managers (India) Optimiser Portfolio	228.75	25.54%	35.53%	14.63%	20.90%	-	27.68%
Invasset Growth Fund	359.12	11.29%	36.66%	17.66%	19.00%	24.62%	28.01%
Wallfort Avenue Fund	134.72	26.26%	34.15%	17.67%	16.48%	-	24.56%

## 5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Since Inception
Counter Cyclical Diversified Long Term Value	792.54	-0.23%	22.77%	37.38%	14.77%	22.61%	44.37%
Seers Enduring Portfolio	343.56	11.43%	27.71%	34.80%	12.94%	21.86%	20.49%
Green Portfolio Super 30 Dynamic Fund	184.69	1.59%	19.99%	31.44%	14.77%	16.67%	23.64%
Wallfort Diversified PMS	379.21	14.62%	40.41%	30.90%	14.77%	16.13%	21.67%
Electrum Laureate Portfolio	470.76	7.56%	22.91%	25.63%	14.78%	10.85%	27.17%

\*Benchmark: As reported on APMI portal

## Alpha Rankings by AUM Category (1000 -5000 Cr.)

### 1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	3Y	5Y	Since Inception
Aequitas India Opportunities Product	4457.32	61.81%	15.07%	46.74%	51.51%	46.55%	34.16%
Carnelian Capital Compounder Strategy	1459.38	37.70%	17.30%	20.40%	27.00%	19.73%	19.13%
Sundaram Alternate SISOP	1475.04	35.09%	17.30%	17.79%	24.15%	17.47%	18.06%
Abakkus All Cap Approach	3993.71	31.58%	17.30%	14.28%	23.81%	-	14.10%
ICICI Prudential Value Strategy	1077.03	31.06%	17.30%	13.76%	30.11%	25.63%	13.42%

### 3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Since Inception
Aequitas India Opportunities Product	4457.32	61.81%	14.64%	36.87%	51.51%	46.55%	34.16%
Green Lantern Growth Fund	1306.39	11.89%	17.66%	23.78%	41.44%	38.99%	22.86%
Equitree Emerging Opportunities	1107.52	-5.30%	17.66%	13.54%	31.20%	25.07%	5.85%
ICICI Prudential PMS Value Strategy	1077.03	31.06%	17.66%	12.45%	30.11%	25.63%	13.42%
Carnelian Bespoke Portfolio	3188.67	30.21%	17.66%	11.42%	29.08%	-	25.30%

### 5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Since Inception
Aequitas India Opportunities Product	4457.32	61.81%	51.51%	46.55%	12.95%	33.60%	34.16%
Green Lantern Growth Fund	1306.39	11.89%	41.44%	38.99%	14.78%	24.21%	22.86%
Carnelian Shift Strategy	4740.78	13.20%	27.59%	27.24%	14.78%	12.46%	31.45%
Abakkus Personalised Opportunity Specific Strategy	1366.53	16.65%	17.98%	26.66%	14.78%	11.88%	35.74%
ICICI Prudential Value Strategy	1077.03	31.06%	30.11%	25.63%	14.78%	10.85%	13.42%

\*Benchmark: As reported on APMI portal

# Alpha Rankings by AUM Category (Above 5000 Cr.)

## 1 Year - Alpha

Name	AUM	1Y	Benchmark 1Y	Alpha 1Y	Benchmark 5Y	Alpha 5Y	Since Inception
Buoyant Opportunities Pms	9126.96	30.13%	17.30%	12.83%	26.11%	24.23%	21.70%
Abakkus All Cap Approach	7780.55	30.07%	17.30%	12.77%	21.41%	19.88%	24.73%
360 One Mandate - Balanced	5273.13	24.76%	14.56%	10.20%	20.60%	15.14%	9.95%
ICICI Prudential PMS Contra Strategy	13391.73	23.48%	17.30%	6.18%	24.33%	21.65%	19.22%
ICICI Prudential PMS Pipe Strategy	7033.35	20.96%	17.30%	3.66%	25.90%	25.02%	25.21%

## 3 Year - Alpha

Name	AUM	1Y	3Y	Benchmark 3Y	Alpha 3Y	5Y	Since Inception
Stallion Asset Core Fund	6309.5	14.29%	36.12%	17.66%	18.46%	23.11%	26.65%
Buoyant Opportunities Pms	9126.96	30.13%	26.11%	17.66%	8.45%	24.23%	21.70%
ICICI Prudential PMS Pipe Strategy	7033.35	20.96%	25.90%	17.66%	8.24%	25.02%	25.21%
360 One Mandate - Balanced	5273.13	24.76%	20.60%	13.90%	6.70%	15.14%	9.95%
ICICI Prudential PMS Contra Strategy	13391.73	23.48%	24.33%	17.66%	6.67%	21.65%	19.22%

## 5 Year - Alpha

Name	AUM	1Y	3Y	5Y	Benchmark 5Y	Alpha 5Y	Since Inception
ICICI Prudential PMS Pipe Strategy	7033.35	20.96%	25.90%	25.02%	14.78%	10.24%	25.21%
Buoyant Opportunities PMS	9126.96	30.13%	26.11%	24.23%	14.78%	9.45%	21.70%
Stallion Asset Core Fund	6309.5	14.29%	36.12%	23.11%	14.78%	8.33%	26.65%
Abakkus Emerging Opportunities Approach	5507.35	12.03%	22.71%	22.21%	14.78%	7.43%	26.75%
ICICI Prudential PMS Contra Strategy	13391.73	23.48%	24.33%	21.65%	14.78%	6.87%	19.22%

\*Benchmark: As reported on APMI portal

# Understanding Alternatives: The Alpha Classroom

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## How PMS AIF World Simplifies PMS & AIF

The investment ecosystem is undergoing considerable turbulence amid current global uncertainties. For investors attempting a PMS Return Comparison or an AIF Return Comparison, the difficulty only increases as they try to identify a strategy that will not eventually translate into future losses.

Investors may either undertake the complex exercise of analysing the different parameters relevant to each strategy, or choose to delegate some of the technical aspects of this evaluation to platforms like PMS AIF WORLD.

## Making PMS & AIF Comparisons Simpler with PMS AIF WORLD

In many cases, the difficulty for investors is not the absence of data, but the effort required to bring scattered information together. The challenge lies in bringing that information into a usable form.

PMS AIF WORLD simplifies this.

It organizes information available on different PMS and AIF strategies within a structured analytical framework. So, instead of requiring investors to gather performance data, portfolio details, and risk indicators from multiple documents, the platform consolidates these elements into a single reference.

Once returns and portfolio characteristics are viewed across similar time periods and market phases, patterns in strategy behaviour begin to appear. For investors, this can provide a hard-headed basis for selecting a more resilient investment strategy.

## The “5-P” Evaluation Framework

One of the central approaches adopted by PMS AIF WORLD involves a qualitative assessment using the 5-P framework.

People. Philosophy. Performance. Portfolio. Price. People here are the ones investors assign to make investment decisions on their behalf, i.e., the fund manager and their team. Since investment outcomes often depend on managerial expertise, understanding the individuals responsible for decision-making becomes an important part of evaluating a PMS or AIF strategy. The first P is thus evaluated based on the fund manager’s experience, credibility, and stability, as well as the strength of the broader investment team.

Philosophy focuses on the strategy’s investment approach (growth investing, value investing, or contrarian positioning). It is a crucial indicator of how the strategy aims to generate returns and the type of risks it is willing to take.

# Understanding Alternatives: The Alpha Classroom

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Performance captures both absolute returns and risk-adjusted indicators across different market cycles. Rather than focusing only on short-term gains, the evaluation also considers long-term stability and downside protection. This assessment is further supported through structured PMS Return Comparison, which allows investors to observe how different strategies perform across comparable time periods.

Portfolio analysis looks at factors such as portfolio concentration, sector allocation, and market-cap exposure. These elements indicate how diversified or focused a strategy may be and help investors identify the sources of potential risk.

Price comes into the picture to understand the cost-effectiveness and competence of the fee structure of the chosen strategy. Evaluating this helps investors determine whether the interests of the fund manager and investor are aligned.

## Q-R-C Scoring Framework

In addition to qualitative evaluation, PMS AIF WORLD employs a quantitative ranking system known as the Quality-Risk-Consistency (Q-R-C) framework. This system tries to simplify complex financial data into a more interpretable scoring model.

The Quality component examines the underlying strength of the companies held in a portfolio, focusing on business fundamentals and financial health.

The Risk dimension incorporates statistical measures such as Sharpe Ratio, Information Ratio, and Maximum Drawdown to indicate how much volatility or downside risk was involved in generating returns.

The Consistency component evaluates how frequently a strategy outperforms its benchmark across different time periods. Instead of relying on a single performance figure, the analysis observes performance patterns across rolling periods.

With PMS AIF WORLD, conducting an AIF Return Comparison allows investors to observe how AIF strategies perform relative to peers and benchmarks, offering a clearer view of long-term performance trends. Performance Intelligence Sheets Another feature that simplifies comparisons is the publication of periodic

Performance Intelligence Sheets. These reports consolidate performance data from a large universe of PMS and AIF strategies, bringing together information that is otherwise dispersed across different fund disclosures.

## Industry Interaction and Investor Engagement

The platform also organizes industry events and investor forums where fund managers and investors interact directly. Such events provide an opportunity for investors to understand the reasoning, strategy design, and long-term outlook of different fund managers.

# Understanding Alternatives: The Alpha Classroom

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Direct engagement helps complement numerical analysis with qualitative insight, allowing investors to better understand the decision-making processes behind different strategies.

## Research and Educational Content

Apart from data aggregation, PMS AIF WORLD also focuses on investor education. Through research articles, webinars, and explanatory resources, the platform explains structural aspects of alternative investments such as taxation rules, lock-in periods, regulatory categories, and portfolio construction techniques.

## Wrapping Up

In a financial environment shaped by uncertainty and information overload, structured analysis becomes indispensable. Through its frameworks, comparative tools, and research-driven insights, PMS AIF WORLD positions itself as a central platform for informed PMS and AIF comparison in India.

Wish to make informed investments for long term wealth creation

# Do not simply invest, make informed decisions



Scan the QR Code to  
book an appointment  
with our experts



Delhi | Mumbai | Bengaluru | Kolkata

[www.pmsaifworld.com](http://www.pmsaifworld.com)