



**PMS AIF WORLD**  
High Performance Investing

**SEPTEMBER, 2025 NEWSLETTER**

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

**MONTH**

SEPTEMBER, 2025

**PREPARED BY**

PMS AIF WORLD

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**MONTHLY PERFORMANCE REPORT**



**Kamal Manocha**

**Founder & CEO**

# The Domestic Anchor: Navigating Global Tides with Indian Conviction

Dear Investor,

Having navigated markets through four complete cycles, I've learned that sustained alpha generation isn't achieved by chasing market momentum, but by partnering with exceptional fund managers who prioritize data over drama.

The Month of August provided a masterclass in the importance of this experienced navigation. Global headwinds intensified with the imposition of US tariffs, triggering significant FII outflows of nearly Rs. 47,000 crore in August. Yet, a historic inflection point emerged: Domestic Institutional Investors (DIIs) stepped in with unprecedented conviction, absorbing the selling with net purchases of over Rs. 94,800 crore. This trend has continued forcefully into September, providing a powerful floor to the market. This is the clearest signal yet that Indian markets are no longer hostage to foreign sentiment.

While short-term traders panicked over tariff headlines, the underlying economic engine was firing on all cylinders. India's Manufacturing PMI surged to 59.3 in August—the highest level since February 2008 and the fastest improvement in operating conditions in 17.5 years. This is not a cyclical uptick; it is evidence of a structural manufacturing renaissance, bolstered by the "China Plus One" strategy and pro-growth domestic policies. While the tariff noise created volatility, India's strong external buffers and a current account deficit of just 0.2% of GDP in Q1 and forex reserves providing robust coverage of external debt provided immense stability.

This period was a real-time validation of our core principle: volatility is the price of admission for superior returns. While others reacted to headlines, disciplined, long-term investors accumulated quality assets, supported by steady SIP flows that remained strong at over Rs. 28,000 crore in August. This is the emotional arbitrage that professional management provides recognizing temporary external shocks versus a structural deterioration in fundamentals.

The evidence is overwhelming. The confluence of a manufacturing ascendancy, the maturation of our financial markets powered by domestic capital, and a clear policy architecture has crystallized my conviction that India is entering its most compelling wealth creation period since liberalization. This is **India's Amrit Kaal - our golden era**. For investors with the discipline to remain committed through short-term volatility, the wealth creation potential is extraordinary.

At PMS AIF World, we see ourselves not just as wealth managers but as strategic curators of talent and strategy connecting you with some of the country's most disciplined fund managers. This moment, we believe, deserves your attention: a new economic narrative is unfolding, and being ahead of it requires clarity, conviction, and access to the right expertise.



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Domestic Indices – 1M Change

SENSEX	79,809.65	-1.69%
NIFTY 50	24,426.85	-1.38%
NIFTY BANK	53,655.65	-4.12%
NIFTY MIDCAP 100	55,727.40	-2.91%
NIFTY SMALLCAP 100	17,227.00	-4.12%

\*Data as of 31st August 2025

Global Indices – 1M Change

DOW JONES	46,065.82	1.25%
NASDAQ 100	23,415.42	0.85%
S&P 500	6,460.25	1.91%
SHANGAI COMP	4,390.4851	8.09%
NIKKEI 225	42,107.00	3.22%

\*Data as of 31st August 2025

NIFTY Indices – 1M & 1Y Change

IT	-0.34%	-17.77%
PHARMA	-4.25%	-6.08%
PSU BANK	-1.39%	-3.27%
PVT BANK	-3.79%	1.44%
AUTO	5.52%	-4.63%
METAL	-1.41%	-2.67%
FMCG	0.59%	-10.97%
INFRA	-2.13%	-5.85%

\*Data as of 31st August 2025

# Price-to-Earnings (PE) Ratio

NIFTY 50

21.5

NIFTY 500

23.5

NIFTY MIDCAP 100

30.4

NIFTY SMALLCAP 100

30.8

## ANALYTICS AND CONTENT BACKED INFORMED QUALITY INVESTING SERVICE

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

# Creating Real Stories Of Wealth Creation Through Alpha Focused Investments

**Our suite of investment products spans a diverse range  
from listed to unlisted,  
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**PMS AIF WORLD**

Top 10 Portfolios In Each Peer Group (Data as of 31st August 2025)

Peer Group 1: Ten Year Plus Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
ICICI PRUDENTIAL	VALUE STRATEGY	946.7	0.16%	0.92%	15.80%	-3.99%	21.97%	26.80%	28.26%	15.90%	13.05%	MULTI CAP
GIRIK WEALTH	MULTICAP GROWTH	1605.08	-1.23%	1.31%	10.02%	-6.49%	20.24%	21.78%	23.00%	18.54%	20.26%	MULTI CAP
VALUEQUEST	PLATINUM	3222.36	-4.35%	-3.95%	9.67%	-8.33%	15.12%	18.79%	30.62%	18.61%	19.32%	MULTI CAP
ALCHEMY	HIGH GROWTH	4564	-1.52%	2.69%	21.93%	1.82%	23.41%	18.67%	24.56%	15.34%	20.08%	MULTI CAP
MOTILAL OSWAL	VALUE MIGRATION	3488.98	-3.90%	-2.31%	21.97%	-2.38%	24.58%	21.81%	21.54%	12.64%	19.66%	MULTI CAP
ICICI PRUDENTIAL	LARGE CAP	829.6	-1.07%	-0.18%	15.99%	-3.80%	22.85%	21.27%	24.09%	14.85%	16.32%	LARGE CAP
NINE RIVERS	AURUM SMALL CAP	-.	-4.00%	-2.10%	20.60%	-10.00%	8.30%	18.00%	29.70%	16.60%	26.22%	SMALL CAP
CARE PORTFOLIO	GROWTH PLUS	868.89	-1.65%	-1.58%	16.32%	-10.81%	15.76%	17.72%	29.59%	14.68%	20.95%	SMALL & MID
DALAL AND BROACHA	LONG TERM GROWTH	1088.27	-0.42%	0.58%	20.26%	-2.29%	20.36%	19.53%	20.59%	14.00%	13.90%	MULTI CAP
KOTAK MAHINDRA AMC	INDIA FOCUS - SERIES I	758.32	-1.82%	-0.58%	13.00%	-2.94%	17.11%	18.08%	25.05%	12.50%	15.29%	MULTI CAP
Peer Group 2: Five Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	
WALLFORT PMS	DIVERSIFIED	251.35	0.85%	11.15%	32.76%	2.06%	42.61%	42.84%	44.22%	26.26%	SMALL & MID	
COUNTER CYCLICAL	DIVERSIFIED LONG TERM	754.28	-4.93%	-4.19%	9.63%	-6.41%	20.58%	29.73%	62.55%	50.93%	SMALL CAP	
STALLION ASSET PVT LTD	CORE	5915.04	1.33%	6.13%	21.16%	7.47%	40.58%	37.42%	33.40%	29.94%	MULTI CAP	
GREEN LANTERN	GROWTH FUND	1138.88	-2.17%	-3.05%	8.24%	-5.27%	36.93%	40.17%	48.76%	23.96%	SMALL & MID	
NEGEN	SPECIAL SITUATIONS	1196.24	-4.32%	-2.20%	20.58%	3.52%	26.97%	24.31%	37.52%	18.55%	MULTI CAP	
EQUITREE	EMERGING OPPORTUNITIES	838.59	-4.38%	-0.66%	9.88%	-5.19%	27.72%	34.12%	42.34%	8.25%	SMALL CAP	
BUOYANT	OPPORTUNITIES	5861.96	-1.33%	2.85%	19.18%	6.49%	17.49%	23.06%	32.20%	21.82%	MULTI CAP	
SAMEEKSHA	EQUITY FUND	1112.32	-3.04%	0.65%	13.84%	1.27%	21.07%	26.83%	29.11%	22.21%	MULTI CAP	
ICICI PRUDENTIAL	PIPE STRATEGY	6744.6	0.17%	0.35%	18.23%	-2.78%	17.89%	25.26%	31.65%	27.08%	SMALL & MID	
2POINT2	LONG TERM VALUE	1561.65	-4.50%	1.40%	18.80%	9.20%	16.20%	24.70%	24.00%	20.00%	MULTI CAP	

- 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 600 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 **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 August 2025)

Peer Group 3: Three Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category
MAXIMAL	PATHFINDER	155.81	-2.78%	0.28%	15.40%	-7.90%	16.59%	28.11%	-	28.70%	MULTI CAP
WALLFORT PMS	AVENUE FUND	121.3	3.60%	5.54%	13.88%	-1.12%	20.95%	27.75%	-	24.32%	SMALL & MID
ALFACCURATE	AAA BUDDING	590.73	-2.61%	-0.21%	21.25%	-3.44%	20.67%	23.52%	-	26.80%	SMALL & MID
SAGEONE	LARGE AND MIDCAP	186	0.20%	2.00%	17.40%	-1.10%	25.90%	21.50%	-	19.70%	MID & LARGE
BADJATE	MULTICAP FUND	152.09	-5.72%	-5.46%	14.61%	-9.43%	21.03%	25.30%	-	20.76%	SMALL & MID
AXIS SECURITIES	PURE CONTRA	2254.97	-2.49%	-2.55%	13.57%	-12.06%	18.90%	21.82%	-	23.10%	MULTI CAP
MOAT FINANCIAL	UPPERCRUST	103.58	-4.11%	-7.09%	20.68%	-8.45%	26.49%	20.88%	-	14.55%	MULTI CAP
360 ONE	PHOENIX PMS	1840.59	-2.27%	0.49%	14.37%	-7.41%	18.61%	19.29%	-	19.99%	MULTI CAP
CAPITALMIND	ALL WEATHER	216.04	-1.40%	0.66%	14.14%	-1.89%	18.69%	17.34%	-	19.76%	MULTI CAP

Peer Group 4: Two Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category
WALLFORT PMS	AMEYA FUND	103.51	-2.72%	-4.31%	3.80%	1.40%	22.21%	-	-	44.54%	SMALL & MID
MOTILAL OSWAL	FOUNDERS	3132.18	-3.94%	-4.02%	19.70%	-4.69%	23.20%	-	-	32.02%	MULTI CAP
SVAN INVESTMENT	VELOCITY	225.2	-5.04%	-3.90%	15.37%	-6.24%	26.99%	-	-	29.18%	SMALL & MID
MONEY GROW	LARGE MIDCAP	77.27	-2.26%	-0.15%	14.31%	-0.30%	17.10%	-	-	20.81%	MULTI CAP
NUVAMA	ABSOLUTE RETURN	880	0.14%	1.64%	9.04%	7.50%	11.93%	-	-	12.03%	DEBT
AXIS SECURITIES	KAIZEN	554.34	-4.56%	-3.50%	9.59%	-10.94%	19.31%	-	-	21.40%	MULTI CAP
ENAM	INDIA VISION	827.52	-2.90%	1.10%	13.50%	-4.40%	11.10%	-	-	14.72%	MULTI CAP
NUVAMA	EQUITIES EXPANSION	284	-4.04%	-3.12%	15.08%	-11.08%	14.51%	-	-	16.41%	MID CAP
PGIM INDIA	EQUITY PORTFOLIO	142.45	-2.19%	-0.96%	14.95%	-10.52%	10.84%	-	-	17.66%	THEMATIC
MARATHON TRENDS	TREND FOLLOWING	432.93	-2.65%	-1.16%	11.41%	-13.90%	9.76%	-	-	21.64%	MULTI CAP

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- 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 600 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.

### Top 10 Portfolios In Each Peer Group (Data as of 31st August 2025)

Peer Group 5: One Year Plus Peer Group											
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category
WAVE	BLOOM	-.	0.15%	-0.52%	7.40%	18.82%	-	-	-	22.99%	MULTI CAP
WALLFORT PMS	INDIA CONTRA EQUITY FUND	-.	-4.96%	-4.90%	13.60%	6.91%	-	-	-	27.18%	SMALL & MID
WAVE	PURE ALPHA	-.	2.14%	7.97%	15.94%	13.97%	-	-	-	15.44%	MULTI CAP
DYNAMIC EQUITIES	BLUECHIP	-.	-0.58%	2.58%	20.08%	0.48%	-	-	-	22.96%	MID & LARGE
FORT CAPITAL	DYNAMIC	-.	-1.00%	1.96%	16.84%	4.22%	-	-	-	21.60%	MULTI CAP
CAPITAL 8	INFINITY	125.58	-1.14%	4.61%	17.03%	-1.63%	-	-	-	24.85%	MULTI CAP
EMKAY	GOLDEN DECADE OF GROWTH	-.	-2.64%	2.15%	18.67%	-1.02%	-	-	-	20.04%	MULTI CAP
PRPEDGE	ALPHAAMONEY EQUITY+	-.	-0.42%	3.91%	12.23%	3.25%	-	-	-	18.70%	ETF
PHILLIP CAPITAL	INCOME BUILDER	-.	0.74%	2.87%	6.36%	12.00%	-	-	-	15.28%	DEBT
CKREDENCE WEALTH	BUSINESS CYCLE	-.	-1.30%	1.77%	14.19%	0.23%	-	-	-	17.95%	MULTI CAP

Peer Group 6: Less then One Year Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
SQUARE 64	MULTICAP	-	-7.26%	10.83%	29.23%	-	-	-	-	-	-0.54%	MULTI CAP
WHITE WHALE	RISING START PF	-	0.72%	6.33%	26.88%	-	-	-	-	-	14.14%	MULTI CAP
SHRIRAM AMC	FUTURE GEMS	-	-3.51%	3.76%	23.91%	-	-	-	-	-	20.61%	SMALL & MID
QODE	FUTURE HORIZON	-	0.20%	2.85%	22.89%	-	-	-	-	-	-7.95%	SMALL CAP
ARTHALPHA	MACHINE LEARNING	-	-2.93%	-1.53%	22.42%	-	-	-	-	-	2.38%	MID & LARGE
CKREDENCE	ICE GROWTH	-	-1.75%	2.85%	19.82%	-	-	-	-	-	1.57%	MULTI CAP
WAYA FINANCIAL	BIN73 SUNRISE ALPHA	-	-8.24%	-3.25%	18.97%	-	-	-	-	-	-1.01%	SMALL & MID
AMALTAS	KEYSTONE FUND	-	-7.31%	-1.97%	16.21%	-	-	-	-	-	-2.08%	MULTI CAP
QODE	ALL WEATHER	-	0.77%	1.05%	16.04%	-	-	-	-	-	12.91%	MULTI CAP
CAPITALMIND	SMARTCORE	-	-0.92%	0.91%	13.63%	-	-	-	-	-	10.50%	MULTI CAP

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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 August 2025)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
MONEYBEE	QUEENBEE	147.14	-3.51%	-2.12%	11.02%	-8.98%	19.06%	23.59%	44.73%	19.18%	20.80%	SMALL & MID
ABSL	SELECT SECTOR	462	-4.52%	-1.60%	19.62%	6.99%	26.58%	24.50%	30.95%	15.34%	17.22%	SMALL & MID
MASTER PORTFOLIO	INDIA GROWTH	-.	-3.37%	0.26%	28.30%	-0.50%	16.50%	19.33%	28.59%	20.49%	25.44%	MID CAP
ACCURACAP	PICOPOWER	515.78	-2.16%	1.42%	22.33%	-7.77%	16.90%	20.28%	26.89%	17.24%	22.70%	SMALL & MID
QUEST	MULTI	-.	-0.25%	1.15%	22.11%	-3.18%	23.24%	19.78%	23.17%	16.35%	16.40%	MULTI CAP
NARNOLIA	MID AND SMALL	-.	-2.10%	-1.24%	16.65%	-3.09%	15.54%	19.34%	19.90%	18.16%	19.00%	SMALL & MID
GREEN PORTFOLIO	DIVIDEND YIELD	20.26	-1.14%	-0.17%	18.95%	-1.60%	23.62%	29.69%	33.36%	-	30.42%	THEMATIC
GREEN LANTERN	ALPHA FUND	53.97	-2.39%	-2.79%	11.39%	-6.56%	27.47%	29.42%	31.63%	-	32.33%	MID & LARGE
ASIT C MEHTA	ACE - MULTICAP	140.24	-2.66%	-2.51%	15.52%	-8.50%	26.38%	35.37%	31.06%	-	19.81%	MULTI CAP
GREEN PORTFOLIO	SUPER 30 DYNAMIC	215.17	-1.76%	-3.01%	12.36%	-7.58%	15.40%	24.63%	36.39%	-	27.99%	THEMATIC

Peer Group 8: Best as per Aug 2025 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
WALLFORT PMS	AVENUE FUND	121.3	3.60%	5.54%	13.88%	-1.12%	20.95%	27.75%	-	-	24.32%	SMALL & MID
VALCREATE	IME DIGITAL DISRUPTION	-.	2.84%	15.86%	33.87%	14.11%	34.66%	-	-	-	40.21%	THEMATIC
RIGHT HORIZONS	PERENNIAL	-.	2.65%	2.22%	11.89%	-11.17%	12.85%	17.12%	-	-	14.92%	MULTI CAP
WAVE	PURE ALPHA	-.	2.14%	7.97%	15.94%	13.97%	-	-	-	-	15.44%	MULTI CAP
MAXIMAL	INCOME FUND	32.21	2.13%	9.03%	15.05%	19.43%	21.82%	19.35%	-	-	20.43%	DEBT
STALLION	CORE FUND	5915.04	1.33%	6.13%	21.16%	7.47%	40.58%	37.42%	33.40%	-	29.94%	MULTI CAP
SUNDARAM	SISOP	-.	1.11%	2.17%	20.29%	8.91%	20.12%	16.26%	20.94%	12.89%	17.81%	MULTI CAP
WALLFORT PMS	DIVERSIFIED	251.35	0.85%	11.15%	32.76%	2.06%	42.61%	42.84%	44.22%	-	26.26%	SMALL & MID
QODE	ALL WEATHER	-.	0.77%	1.05%	16.04%	-	-	-	-	-	12.91%	MULTI CAP
AMBIT	COFFEE CAN	-.	0.75%	3.80%	17.30%	2.71%	15.95%	11.05%	15.95%	-	14.80%	LARGE CAP

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	-1.21%	-0.71%	11.33%	-2.01%	14.03%	12.49%	17.92%	13.23%
BSE 500 TRI	-1.75%	-0.89%	13.62%	-4.71%	15.99%	14.41%	20.33%	14.27%

WISH TO MAKE INFORMED INVESTMENTS FOR LONG TERM WEALTH CREATION

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**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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