



**PMS AIF WORLD**  
High Performance Investing

**FEBRUARY, 2022 NEWSLETTER**

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

**MONTH**  
FEBRUARY, 2022

**PREPARED BY**  
PMS AIF WORLD

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**MONTHLY PERFORMANCE REPORT**

## Richer, Happier, Wiser Investors



**Kamal Manocha**

Founder & CEO,  
PMS AIF World

Dear Readers,

Thank You for the appreciation and accolades on the quality of our work.

We started our journey in 2019 with a Promise of Knowledge driven High Performance Investing.

In last 3 years, we've worked through out to keep our promise.

As a result, today we provide investment services to more than 400 well informed investor families across 27 cities and 7 countries .

For our clients, our intention is not only Richer, but Happier and Wiser too 😊 and this is where we conceptualized our 3<sup>rd</sup> annual investment summit on the same topic.

We would like to tell you that this was largest investment summit of relevant audience in a true sense, as we got over 3300+ registrants and almost 55% identified themselves as PMS / AIF investors. The Summit covered 12 highly thoughtful topics and viewpoints of 30+ portfolio managers & thought leaders.

As part of our responsibility towards acknowledging the good performance, the event covered the 3<sup>rd</sup> edition of smart money manager awards based on a simple format of risk adjusted returns, in association with IIM-A's finance club.

In this newsletter, we are attaching some snippets from the event and the list of nominations as well as winners whose performance we recognized in the annual event based on risk adjusted returns



## A few **comments**, we received from Investors who attended the recent **Investment Summit**

“Very Informative & very well-organized event. Congratulations 🙌🙌”

“Congratulations on conducting such a large PMS-AIF industry wide Summit... I enjoyed all sessions and got reassured that time in market is more important than timing the market.... The sessions were quite informative 👍”

“This was one nice even. V well conducted with these heavyweights 👍. All were v sensible questions n answers... N Sunil Singhania just hates Asian paints 😊”

“Nice. Samit, Dheeraj n Siddhartha together in one panel was too good 🙌”

“Excellent work Kamal by you and team PMS AIF World !”

“Your award process was nice. You showed the numbers/results for nominees for all categories... Establishes credibility”

“Sameer Arora was funny. Nicely put his answers”

“Your articulation “here are 3 types of investors...” was excellent in session “DNA of multibaggers...”.

“Your moderation was awesome as always”

“Mr. Raamdeo A was really candid and clear”

“Investing experience with the way you keep imparting knowledge truly keeps investor happy”

“PMS AIF World is a Best Emerging Wealth Manager of India”





PMS AIF WORLD

# **PMS AIF WORLD's 3<sup>rd</sup> Annual Summit & Awards 2022**

**A BIG HIT**

**WE THANK YOU  
FOR MAKING THE EVENT**

**A GRAND SUCCESS**

We extend our heartfelt gratitude to you for making this a huge success!

In case you missed any session, we regret as attending the event live is a totally different experience. But worry not, we will be soon uploading all session recording on our [YouTube Channel.](#)



PMS AIF WORLD

# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES



India's most thoughtful summit for Investors

### Crystal Gazing 3.0

Richer, Happier, Wiser Investors

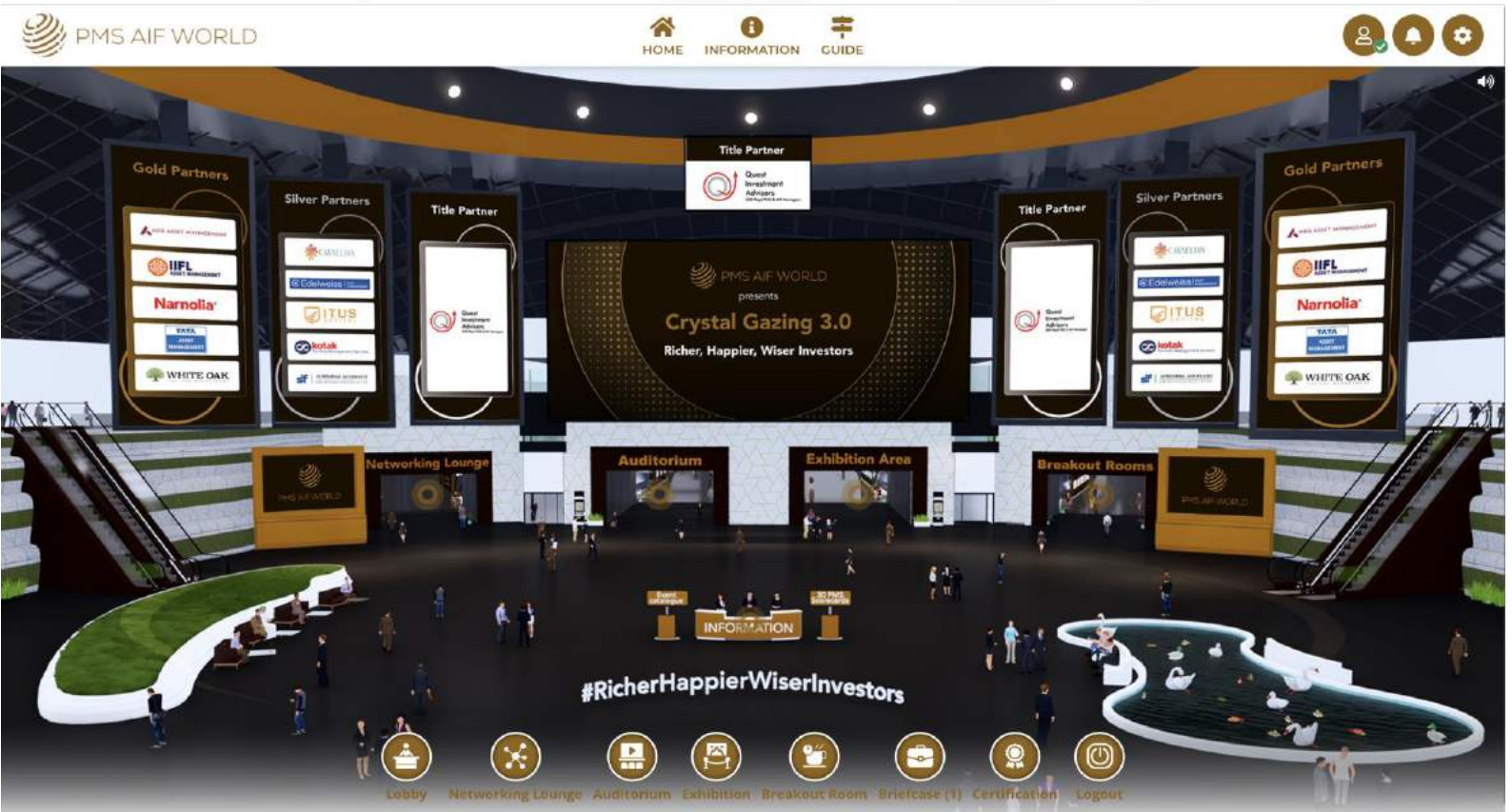
## PMS AIF World Summit & Awards 2022


 PMS AIF WORLD

11<sup>th</sup> & 12<sup>th</sup> Feb 2022

### Live Virtual Event

Opportune Decade for Wealth Creation



 PMS AIF WORLD

HOME INFORMATION GUIDE

Do, Bell, Settings

Gold Partners: AIA ASSET MANAGEMENT, IIFL, Narnolia, WHITE OAK

Silver Partners: CANFIN, Edulwisdom, ITUS, Kotak

Title Partner: Quest Investment Advisory

Title Partner: Quest Investment Advisory

Silver Partners: CANFIN, Edulwisdom, ITUS, Kotak

Gold Partners: AIA ASSET MANAGEMENT, IIFL, Narnolia, WHITE OAK

PMS AIF WORLD presents **Crystal Gazing 3.0** Richer, Happier, Wiser Investors

Auditorium, Exhibition Area, Breakout Rooms

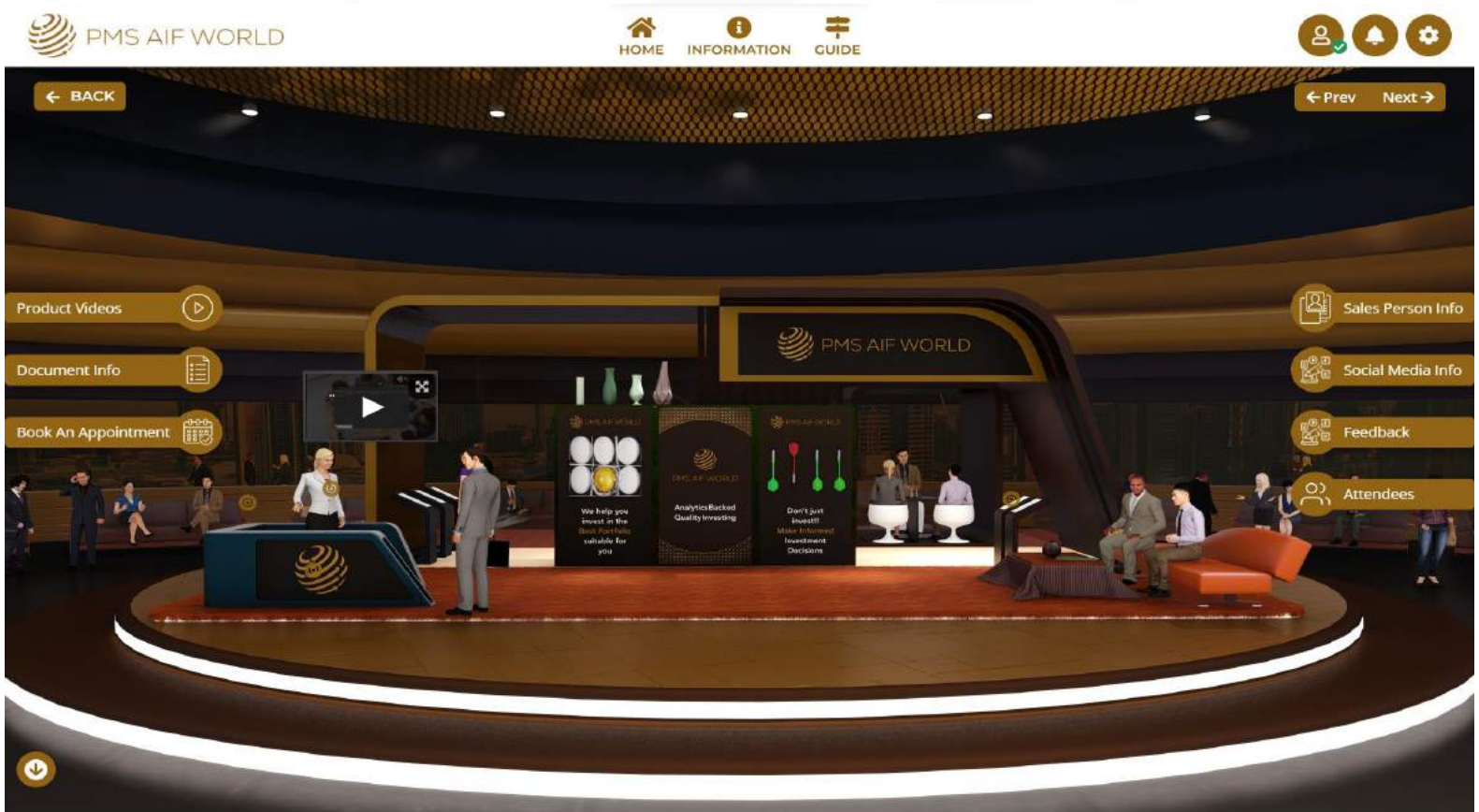
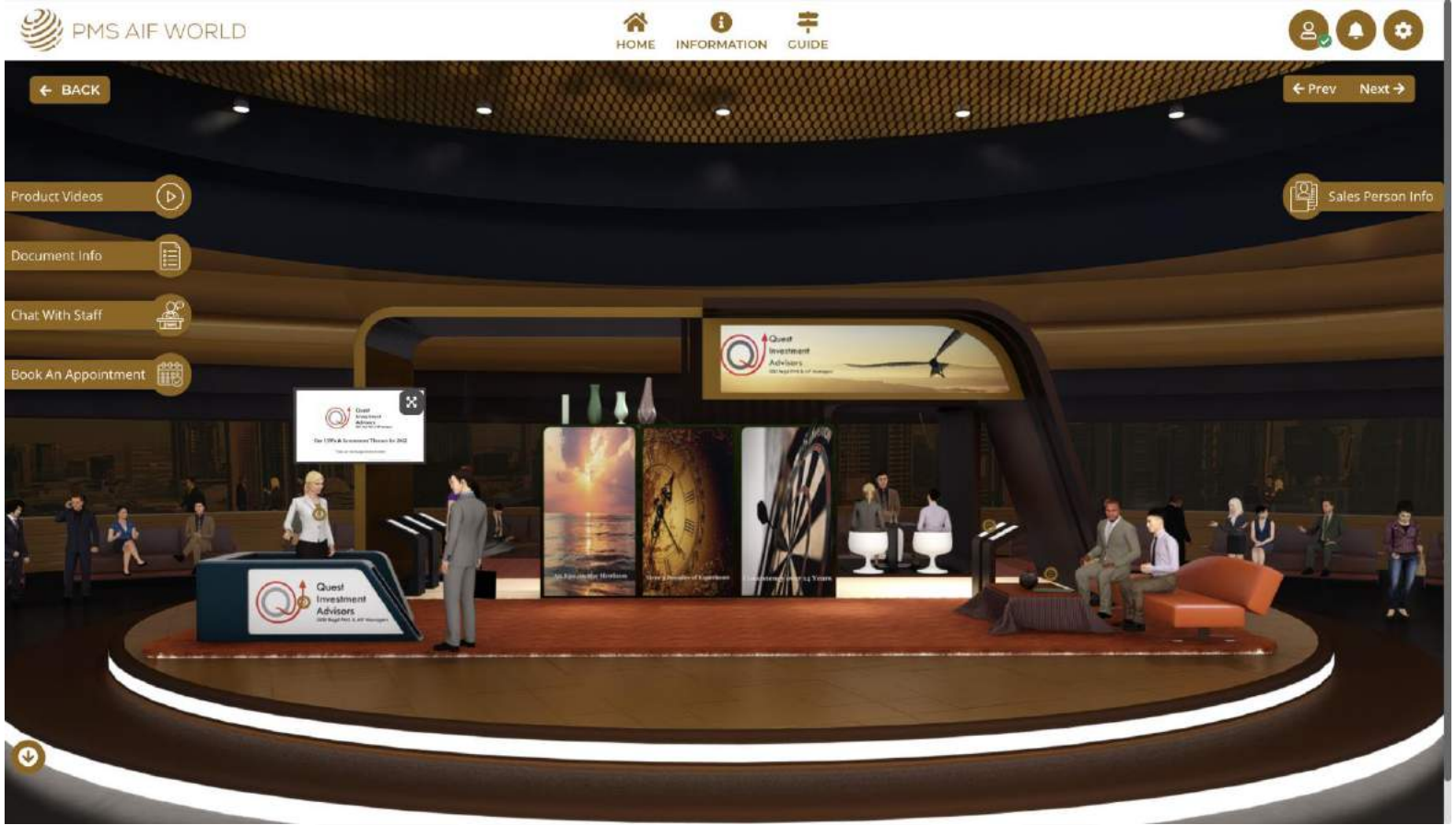
Networking Lounge

#RicherHappierWiserInvestors

Lobby, Networking Lounge, Auditorium, Exhibition, Breakout Room, Briefcase (1), Certification, Logout

# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES





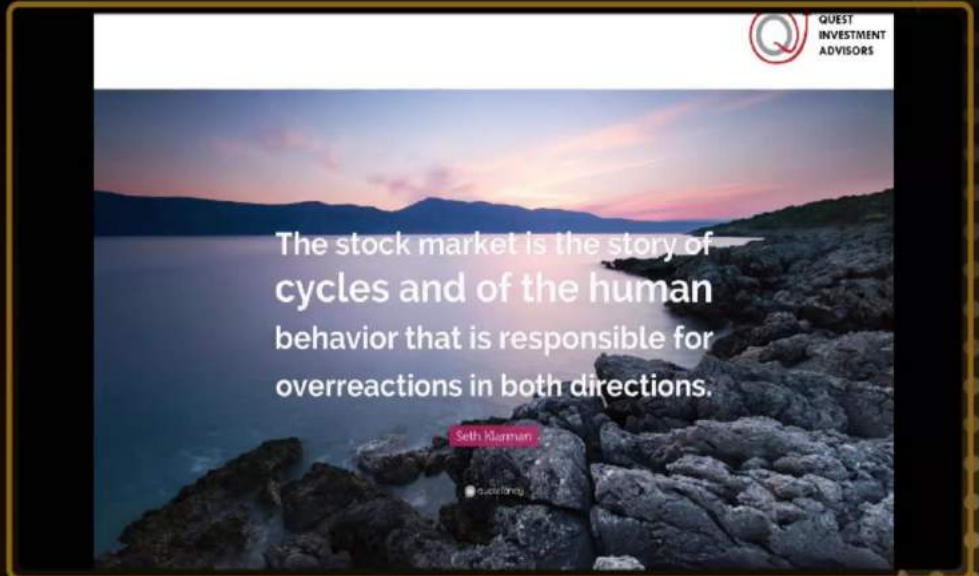
# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES

### Crystal Gazing Markets for Richer, Happier, Wiser Investors



Aniruddha Sarkar  
Quest Investment Advisors



### Crystal Gazing Markets for Richer, Happier, Wiser Investors



Hiren Ved  
Alchemy Capital



# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES

### Crystal Gazing Markets for Richer, Happier, Wiser Investors



### Crystal Gazing Markets for Richer, Happier, Wiser Investors





# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES

### Crystal Gazing Markets for Richer, Happier, Wiser Investors



### Crystal Gazing Markets for Richer, Happier, Wiser Investors



# RICHER, HAPPIER, WISER INVESTORS

## FEW GLIMPSES

Crystal Gazing Markets for Richer, Happier, Wiser Investors



Amit Jeswani  
Staffen Asset

Neil Bahal  
Negen Capital

Sankalpo Pal  
PMS AIF World

 PMS AIF WORLD

Crystal Gazing Markets for Richer, Happier, Wiser Investors



Nalin Moniz  
Edelweiss AMC

Harsh Agarwal  
Tata AMC

Rajesh Bhatia  
ITI Long Short Equity Fund

Bhautik Ambani  
Aventus Capital Public Markets Alternate Strategies LLP

 PMS AIF WORLD

# RICHER, HAPPIER, WISER INVESTORS





## FEW GLIMPSES


Crystal Gazing Markets for Richer, Happier, Wiser Investors

 <p><b>Anshul Saigal</b> Kotak Mahindra AMC</p>	 <p><b>Shailendra Kumar</b> Niraha</p>
 <p><b>Madanagopal Ramu</b> Sundaram Alternates</p>	 <p><b>Rakhi Prasad</b> Alder Capital</p>

 PMS AIF WORLD

Crystal Gazing Markets for Richer, Happier, Wiser Investors





 <p><b>Samir Arora</b> Helios Capital</p>	 <p><b>Bharat Shah</b> ASK Group</p>
 <p><b>Rajesh Kothari</b> AltAccurate Advisors</p>	 <p><b>Lakshmi Iyer</b> Kotak Mahindra AMC</p>


 PMS AIF WORLD

# RICHER, HAPPIER, WISER INVESTORS





## FEW GLIMPSES


Crystal Gazing Markets for Richer, Happier, Wiser Investors

 <p><b>Amit Ratanpal</b> BLinC Invest</p>	 <p><b>Debojyoti Ghosh</b> Axis AMC</p>
 <p><b>Abhishek Agarwal</b> Rockstud Capital LLP</p>	 <p><b>Lavanya Ashok</b> Trifecta Capital</p>

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Crystal Gazing Markets for Richer, Happier, Wiser Investors

 <p><b>Kunal Pawaskar</b> Tata AMC</p>	 <p><b>Ashwin Patni</b> Axis AMC</p>
 <p><b>Naveen Chandramohan</b> ITUS Capital</p>	 <p><b>Sonam Srivastava</b> DSP Investment Managers</p>

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**RICHER, HAPPIER, WISER INVESTORS**

**CONGRATULATIONS TO ALL WINNERS!**



 PMS AIF WORLD 

Best PMS on 10 Year Performance  
Across All Categories

*Rank 1*

**Accuracap  
Picopower**

On  
Risk Adjusted Rolling Returns

 PMS AIF WORLD 

Best PMS on 10 Year Performance  
Across All Categories

*Rank 2*

**Master Portfolio Services  
Vallum India Discovery**

On  
Risk Adjusted Rolling Returns

 PMS AIF WORLD 

Best PMS on 10 Year Performance  
Across All Categories

*Rank 3*

**Girik Capital  
Multicap Growth Equity Strategy**

On  
Risk Adjusted Rolling Returns



**RICHER, HAPPIER, WISER INVESTORS**

**CONGRATULATIONS TO ALL WINNERS!**

 **PMS AIF WORLD**

**Best PMS on 5 Year Performance  
Across All Categories**

**Rank 1**

**Equirus Securities  
Long Horizon Fund**

**On  
Risk Adjusted Rolling Returns**



 **PMS AIF WORLD**

**Best PMS on 5 Year Performance  
Across All Categories**

**Rank 2**

**Narnolia Financial Advisors  
Multicap Strategy**

**On  
Risk Adjusted Rolling Returns**



 **PMS AIF WORLD**

**Best PMS on 3 Year Performance  
Multi Cap Category**

**Rank 1**

**Solidarity Advisors  
Prudence**

**On  
Risk Adjusted Rolling Returns**





## **RICHER, HAPPIER, WISER INVESTORS**

### **CONGRATULATIONS TO ALL WINNERS!**

 PMS AIF WORLD 

Best PMS on 3 Year Performance  
Multi Cap Category

*Rank 2*

**Stallion Asset  
Core Fund**

On  
Risk Adjusted Rolling Returns

 PMS AIF WORLD 

**Fastest Wealth Creating PMS  
Multicap Category  
3 Years**

*Winner*

**Sameeksha Capital  
Equity Fund**

 PMS AIF WORLD 

Best PMS on 2 Year Performance  
Multi Cap Category

*Winner*

**White Oak Capital  
India Pioneers Equity**

On  
Risk Adjusted Rolling Returns



## **RICHER, HAPPIER, WISER INVESTORS**

### **CONGRATULATIONS TO ALL WINNERS!**

 PMS AIF WORLD 

**Best PMS on 3 Year Performance  
Mid & Small Cap Category**

**Rank 1**

**SageOne Investment  
Core Portfolio**

**On  
Risk Adjusted Rolling Returns**

 PMS AIF WORLD 

**Best PMS on 3 Year Performance  
Mid & Small Cap Category**

**Rank 2**

**Equirus Securities  
Long Horizon Fund**

**On  
Risk Adjusted Rolling Returns**

 PMS AIF WORLD 

**Best PMS on 2 Year Performance  
Mid & Small Cap Category**

**Winner**

**SageOne Investment  
Small & Micro Cap Portfolio**

**On  
Risk Adjusted Rolling Returns**





**RICHER, HAPPIER, WISER INVESTORS**

**CONGRATULATIONS TO ALL WINNERS!**

 PMS AIF WORLD 

**Best PMS on 1 Year Performance  
Across All Categories**

**Rank 1**

**Negen Capital  
Special Situations & Technology Fund**

**On  
Risk Adjusted Returns**

 PMS AIF WORLD 

**Best PMS on 1 Year Performance  
Across All Categories**

**Rank 2**

**Kotak AMC  
Special Situations Value Series 2**

**On  
Risk Adjusted Returns**

 PMS AIF WORLD 

**Best PMS on Absolute Returns  
And, Best Theme Identification  
(Post Pandemic Period)**

**Winner**

**Carnelian Asset Advisors  
Shift Strategy**



**RICHER, HAPPIER, WISER INVESTORS**

**CONGRATULATIONS TO ALL WINNERS!**

 PMS AIF WORLD 

**Best AIF CAT 3  
Long Only**

**Rank 1**

**Roha Asset Managers  
Emerging Companies Fund**

On  
**3 Years Of Risk Adjusted Returns**

 PMS AIF WORLD 

**Best AIF CAT 3  
Long Only**

**Rank 2**

**Abakkus Asset Manager  
Growth Fund- 1**

On  
**3 Years Of Risk Adjusted Returns**

 PMS AIF WORLD 

**Best AIF CAT 3  
Equity Long Short**

**Rank 1**

**Tata AMC  
Equity Plus Absolute Returns Fund**

On  
**18 Months Of Risk Adjusted Returns**



**RICHER, HAPPIER, WISER INVESTORS**

**CONGRATULATIONS TO ALL WINNERS!**

 PMS AIF WORLD 

Best AIF CAT 3  
Equity Long Short

*Rank 2*

**Edelweiss Asset Management  
Alternative Equity Scheme**

On  
18 Months Of Risk Adjusted Returns

 PMS AIF WORLD 

Best AIF CAT 3  
Pure Long Short

*Winner*

**Whitespace Alpha  
Debt Plus Fund**

On  
12 Months Of Risk Adjusted Returns

## Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> January 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	1039.42	-4.5%	4.2%	3.5%	59.9%	51.2%	35.9%	21.4%	27.6%	25.5%	Small Cap	Raman Nagpal
Master Portfolio	MPSL Vallum India Discovery	597.69	2.1%	-0.1%	6.5%	62.3%	45.3%	31.8%	21.2%	29.8%	28.9%	Mid Cap	Investment Committe
ValueQuest	Growth Scheme	793.32	3.8%	6.4%	9.0%	69.5%	47.9%	30.7%	17.7%	23.7%	18.8%	Multi Cap	Sameer Shah
Karma Capital	Long Only	4605	0.4%	3.7%	15.8%	59.6%	36.2%	23.0%	14.2%	19.6%	14.8%	Multi Cap	Rushabh Sheth
Girik Capital	MultiCap	854.96	0.6%	1.1%	6.7%	44.3%	33.1%	27.3%	20.0%	24.5%	21.5%	Multi Cap	Charandeep Singh
Sundaram	SELF	657	-1.4%	-3.6%	7.9%	48.5%	31.2%	27.7%	19.4%	21.0%	19.2%	Multi Cap	Madnagopal Ramu
Alchemy	Select Stock	3380	-1.3%	-2.0%	12.8%	46.2%	21.2%	17.9%	16.0%	20.8%	21.2%	Multi Cap	Hiren Ved
Sundaram	SISOP	-	-4.2%	-5.0%	6.7%	38.0%	25.0%	24.8%	16.5%	17.1%	19.2%	Multi Cap	Madnagopal Ramu
Alfaccurate	AAA IOP	1173	-2.4%	-1.6%	7.2%	34.9%	25.2%	20.4%	16.0%	21.1%	19.3%	Multi Cap	Rajesh Kothari
Quest	Flagship	909	-0.8%	-2.1%	3.5%	34.2%	27.4%	21.1%	14.5%	17.8%	17.5%	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	
ValueQuest	Platinum Scheme	-	9.7%	9.6%	15.9%	82.6%	53.5%	38.5%	24.2%	21.4%	Multi Cap	Ravi Dharamshi	
SageOne <sup>^</sup>	Core	2100	-4.1%	1.2%	2.5%	53.4%	42.1%	33.5%	22.3%	36.6%	Mid & Small	Samit Vartak	
Valentis	Rising Star Opportunity	-	3.1%	2.3%	9.1%	85.6%	59.4%	30.9%	22.6%	20.9%	Small & Mid	Jyotivardhan Jaipuraiya	
Equirus	Long Horizon	536.83	-4.1%	-5.3%	-0.5%	52.9%	51.7%	42.6%	30.2%	28.2%	Small & Mid	Viraj Mehta	
Aequitas Investment	India Opportunities	1214	4.4%	4.2%	0.9%	83.0%	41.8%	17.8%	19.4%	31.2%	Small Cap	Siddhartha Bhaiya	
Sameeksha	Equity	639.9	-2.2%	-0.8%	6.8%	45.1%	42.5%	38.4%	23.9%	23.3%	Multi Cap	Bhavin Shah	
Solidarity	Prudence	1315.87	-0.2%	0.8%	4.9%	40.9%	36.1%	34.4%	24.1%	23.0%	Multi Cap	Manish Gupta	
Narnolia	Multicap	325	1.4%	3.7%	16.6%	42.5%	34.9%	26.7%	20.7%	21.9%	Multi Cap	Shailendra Kumar	
Quest	Multi PMS	885	-2.2%	-0.4%	0.2%	39.0%	31.6%	23.4%	15.8%	16.6%	Multi Cap	Aniruddha Sarkar	
IIFL	Multicap	-	0.2%	0.9%	8.4%	32.8%	24.7%	26.0%	19.7%	20.9%	Multi Cap	Mitul Patel	

• 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> January 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	182.78	0.1%	2.1%	13.4%	73.8%	52.6%	38.7%	-	16.3%	Multi Cap	Neil Bahal
Green	Special	163.69	1.8%	2.6%	1.3%	61.6%	40.6%	32.4%	-	30.4%	Multi Cap	Divam Sharma
NJ	Bluechip	1045	-7.2%	0.0%	13.5%	47.8%	37.4%	28.3%	-	21.0%	Multi Cap	Viral Shah
Ambit	Emerging Giants	223.39	-2.2%	1.3%	4.7%	38.3%	35.2%	29.2%	-	18.2%	Multi Cap	Aishvarya Dadheech
Kotak AMC	SSV 2	575	-3.3%	-0.4%	6.2%	58.9%	29.6%	21.6%	-	8.9%	Small Cap	Anshul Saigal
Stallion	Core Fund	544.32	-9.3%	-6.5%	-1.4%	29.5%	31.8%	33.1%	-	29.1%	Multi Cap	Amit Jeswani
ICICI	Contra	720.4	5.3%	0.7%	6.4%	41.7%	29.6%	22.7%	-	19.6%	Multi Cap	Anand Sharma
Aditya Birla	India Special Opportunity	532	0.0%	-0.8%	3.2%	38.1%	25.2%	23.5%	-	17.7%	Multi Cap	Vishal Gajwani
IIFL	Multicap Advantage	-	0.3%	0.8%	7.4%	28.7%	24.2%	24.2%	-	18.1%	Multi Cap	Mitul Patel
Motilal	IOP2	533	-2.3%	-0.7%	2.4%	37.9%	29.5%	22.8%	-	9.7%	Multi Cap	Manish Sonthalia

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Sage One	Small Cap	590	-1.4%	6.8%	13.5%	71.2%	61.2%	-	-	44.9%	Small Cap	Samit Vartak
KRIIS	Multi Cap Advantage	88.5	0.0%	0.2%	6.1%	70.3%	45.7%	-	-	49.5%	Multi Cap	Rakesh Doshi
Right Horizons	Flexi Cap	-	-3.5%	2.3%	18.4%	55.8%	34.5%	-	-	25.3%	Multi Cap	Anil Rego
Wize Market Analytics	Capital Mind-Momentum	355.96	-3.3%	-2.0%	-2.3%	54.3%	44.4%	-	-	33.5%	Multi Cap	Anoop Vijaykumar
Motilal	Focused Mid Cap	288	-4.2%	-0.2%	1.4%	41.9%	42.9%	-	-	41.8%	Mid & Small	Rakesh Tarway
Marcellus	Little Champs	755.05	-2.9%	0.2%	2.2%	42.6%	37.7%	-	-	40.1%	Small Cap	Ashvin Shetty
Alchemy	Ascent	449	-1.8%	3.0%	3.8%	62.1%	26.8%	-	-	26.5%	Multi Cap	Vikas Kumar
ICICI	PIPE	672.4	4.1%	-0.4%	0.4%	53.4%	33.0%	-	-	31.1%	Small Cap	Anand Shah
White OAK	Pioneers	6628	-3.8%	-2.4%	4.3%	33.5%	29.1%	-	-	24.7%	Multi Cap	Team White Oak
TATA	ACT	-	-2.0%	-3.0%	7.9%	27.3%	20.7%	-	-	15.9%	Multi Cap	Tejas Gutka

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➤ Data above 1Y is CAGR and upto 1Y is Absolute returns.

▲ For ITUS<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> January 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
Roha	Emerging Champions	-	4.5%	9.1%	11.1%	94.4%	-	-	-	86.0%	Small & Mid	Dhiraj Sachdev
Marcellus	Kings Of Capital	631.9	3.3%	-5.1%	2.7%	13.7%	-	-	-	22.3%	Multi Cap	Ashvin Shetty
Moat	Aggressive Leaders Fund	-	2.5%	7.6%	12.6%	80.6%	-	-	-	76.1%	Mid & Small	Koushik Mohan
Abakkus	All Cap Approach	-	-0.6%	3.0%	6.2%	65.1%	-	-	-	66.1%	Multi Cap	Sunil Singhania
Abakkus	Emerging Opportunities	-	-0.8%	2.0%	4.2%	75.6%	-	-	-	69.3%	Multi Cap	Sunil Singhania
Care	Large & Mid Cap	-	-1.1%	-0.9%	5.2%	25.3%	-	-	-	28.6%	Multi Cap	Jayant Mamania
Purnartha	Long Term Equity	-	-2.8%	-7.3%	-2.0%	13.1%	-	-	-	14.3%	Large Cap	Rohit Jain
Emkay	Gems	-	-2.9%	-1.1%	3.8%	33.0%	-	-	-	31.5%	Mid & Small	Kashyap Javeri
Helios	India Rising	478.47	-3.7%	-2.0%	6.1%	28.8%	-	-	-	37.0%	Multi Cap	Dinshaw Irani
Carnelian	Shift Strategy	-	-7.7%	1.7%	2.1%	66.7%	-	-	-	70.5%	Multi Cap	Manoj Bahety

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Magadh Capital Advisors LLP	Value For Growth	-	1.8%	0.2%	-	-	-	-	-	-0.1%	Multi Cap	Vipul Prasad
Magadh Capital Advisors LLP	Future Stars	-	0.4%	3.5%	-	-	-	-	-	6.5%	Multi Cap	Vipul Prasad
Incred PMS	Multicap Portfolio	-	-2.0%	-2.7%	-2.0%	-	-	-	-	11.8%	Multi Cap	Aditya Khemka
Purnartha	Focused Equity	-	-3.3%	-5.2%	0.0%	-	-	-	-	12.6%	Large Cap	Rohit Jain
Fractal Capital Investments	Wealth Builder	-	-3.5%	-2.8%	2.7%	-	-	-	-	14.8%	Multi Cap	Miten Lathia
Incred PMS	Healthcare Portfolio	-	-6.4%	-6.5%	-13.0%	-	-	-	-	9.6%	Multi Cap	Aditya Sood
Right Horizons	Perennial	-	-7.8%	-5.5%	2.4%	-	-	-	-	15.8%	Multi Cap	Satwik Jain
Anand Rathi	Decennium	-	-0.3%	-	-	-	-	-	-	-1.5%	Multi Cap	Mayur Shah
Prabhudas Lilladher	Multi Asset Dynamic Portfolio	-	-2.5%	-2.7%	0.2%	-	-	-	-	0.0%	Multi Asset	Sidharth Vora

- 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.



**Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> January 2022)**

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Sundaram	PACE	-	-1.0%	-2.5%	11.6%	47.4%	25.1%	23.7%	16.2%	16.9%	14.5%	Multi Cap
Sundaram	Rising	-	-0.2%	3.9%	16.0%	57.3%	28.2%	21.2%	12.1%	20.2%	15.7%	Small Cap
Nine Rivers	Aurum Small Cap Opp	-	0.1%	4.5%	-0.3%	71.7%	54.8%	30.9%	17.1%	-	30.4%	Small Cap
Right Horizons	Under Served	-	-0.1%	-1.1%	13.6%	85.1%	46.5%	28.5%	17.1%	-	18.0%	Small Cap
Centrum	Microcap	-	1.5%	7.0%	3.9%	70.3%	46.8%	35.6%	22.7%	-	16.7%	Small Cap
NJAMPL	Multicap	189.49	-1.9%	2.9%	14.5%	65.1%	34.6%	27.0%	13.5%	-	14.5%	Multi Cap
Edelweiss	Focused Smallcap	114	-1.9%	3.7%	8.5%	62.9%	38.9%	29.2%	14.2%	-	12.0%	Small & Mid
Capgrow	Special Situations	-	-2.1%	1.9%	7.8%	62.7%	34.1%	27.4%	-	-	24.1%	Multi Cap
Valentis	Multi Cap	-	2.3%	1.6%	11.2%	45.8%	24.1%	23.3%	-	-	26.6%	Multi Cap
NAFA	Small Cap	-	0.8%	6.5%	18.5%	58.2%	44.2%	-	-	-	30.1%	Small 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. 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.
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Top 10 Portfolios In Each Peer Group (Data as of 31<sup>st</sup> January 2022)

Peer Group 8: Best as per December 2021 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
ValueQuest	Platinum Scheme	-	9.7%	9.6%	15.9%	82.6%	53.5%	38.5%	24.2%	-	21.4%	Multi Cap
Green	MNC	14.26	6.3%	5.6%	10.4%	52.3%	37.2%	-	-	-	32.0%	Thematic
Green	Super 30	6.52	5.9%	16.1%	10.5%	134.7%	50.6%	-	-	-	42.5%	Thematic
ICICI	Value	96.2	5.8%	0.9%	5.3%	38.6%	21.5%	18.0%	14.2%		17.1%	Multi Cap
ICICI	Contra	720.4	5.3%	0.7%	6.4%	41.7%	29.6%	22.7%	-		19.6%	Multi Cap
Roha	Emerging Champions	-	4.5%	9.1%	11.1%	94.4%					86.0%	Mid & Small
Aequitas Investment	India Opportunities	1214	4.4%	4.2%	0.9%	83.0%	41.8%	17.8%	19.4%	-	31.2%	Small Cap
Oak	ABC	-	4.3%	4.2%	10.2%	32.2%	-	-	-	-	31.2%	Multi Cap
ICICI	PIPE	672.4	4.1%	-0.4%	0.4%	53.4%	33.0%	-	-		31.1%	Small Cap
Right Horizons	AlphaBots	-	4.1%	1.5%	11.8%	36.9%	24.2%	-	-	-	17.0%	Thematic

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	
Nifty 50	-0.1%	-1.9%	10.0%	27.2%	20.4%	17.0%	15.0%	13.0%	Large Cap
Nifty 500	-0.5%	-0.9%	9.6%	33.4%	24.3%	19.6%	16.5%	15.1%	Multi Cap
Nifty Mid Cap 100	-0.6%	-0.6%	8.8%	44.8%	29.6%	21.4%	14.4%	-	Mid Cap
Nifty Small Cap 100	-1.5%	3.3%	5.7%	54.9%	33.6%	21.9%	12.0%	-	Small Cap

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- 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 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.
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