



PMS Navigator

Dec 2024 | Issue 90

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Our bouquet of PMS offerings

Schemes	Fund Manager	Launch Date	Category	AUM (Rs cr)	Performance (%)					Factsheet	PPT
					1 Year	3 Years	5 Years	7 Years	Since Inception		
MOAMC Founders	Vaibhav Agrawal	16-Mar-23	Multi Cap	2,070*	46.6	--	--	--	56.4	Link	Link
MOAMC Value Migration	Vaibhav Agrawal	18-Feb-03	Multi Cap	2,556*	42.8	25	20.3	16.6	20.7	Link	Link
MOAMC Mid to Mega	Rakesh Tarway	24-Dec-19	Mid & Small Cap	1,764*	40.3	21.0	--	--	30.0	Link	Link
MOAMC BOP	Vaibhav Agrawal	18-Dec-17	Multi Cap	1,508*	32.6	22.4	20.2	--	16.1	Link	Link
MOAMC NTDOP	Vaibhav Agrawal	03-Aug-07	Multi Cap	6,183*	29.4	13.3	15.7	11.7	15.8	Link	Link
MOAMC Ethical	Vaibhav Agrawal	08-Jun-21	Multi Cap	75*	32.5	18.0	--	--	19.3	Link	Link
SBI AEON	Gaurav Mehta	21-Jan-21	Multi Cap	680	27.8	--	--	--	21.9	Link	Link
Marathon Trend Following	Atul Suri	01-Apr-23	Multi Cap	477	28.1	--	--	--	41.7	Link	Link
Renaissance Opp Portfolio	Pankaj Murarka	01-Jan-18	Large Cap	464	30.3	21.0	21.2	--	15.2	Link	Link
Renaissance Midcap	Pankaj Murarka	01-Jan-18	Mid & Small Cap	183	27.9	26.2	25.1	--	15.6	Link	Link
Buoyant Opp Portfolio	Sachin Khivasara	01-Jun-16	Multi Cap	4,173	23.6	22.3	27.0	16.7	23	Link	Link
Abakkus AACA	Aman Chowhan	29-Oct-20	Large & Mid Cap	6,917	22.1	18.1	--	--	30.2	Link	Link*
Abakkus AEOA	Aman Chowhan	26-Aug-20	Mid & Small	5,022	35.0	26.1	--	--	39.0	Link	Link*

Our bouquet of PMS offerings

Schemes	Fund Manager	Launch Date	Category	AUM (Rs cr)	Performance (%)					Factsheet	PPT
					1 Year	3 Years	5 Years	7 Years	Since Inception		
Abakkus DAA	Aman Chowhan	16-Jan-24	Multi Cap	817	--	--	--	--	14.7	Link	Link*
Alchemy High Growth	Hiren Ved	08-May-02	Multi Cap	910	24.1	14.0	13.0	8.6	21.1	Link	Link
Alchemy Smart Alpha 250	Alok Agarwal	10-Aug-24	Multi Cap	453	37.6	--	--	--	40.5	Link	Link
UNIFI Blended Rangoli	Prithvi	01-Jun-17	Multi Cap	15,935*	19.6	15.5	30.8	--	21.9	NP	Link
Narnolia Industry Champ	Shailendra Kumar	28-Mar-12	Large Cap	48	31.8	13.0	16.9	13.9	17.3	Link	Link
Narnolia Mid and Small	Shailendra Kumar	04-May-15	Mid & Small Cap	82	31.7	19.4	24.8	18.4	21.2	Link	Link
Narnolia Multi Cap	Shailendra Kumar	28-Mar-12	Multi Cap	352	18.5	9.7	14.2	10.0	16.4	Link	Link
Narnolia 5Tx5T	Shailendra Kumar	04-May-15	Multi Cap	34	23.0	13.2	18.0	15.3	17.3	Link	Link
ICICI Pipe	Anand Shah	05-Sep-19	Mid & Small Cap	6,684	31.9	31.9	33.6	--	32.1	Link	Link
ICICI Contra	Anand Shah	14-Sep-18	Multi Cap	9,731	31.1	25.3	25.7	--	25.7	Link	Link
Invesco Dawn	Neelesh Dhamnaskar	28-Aug-17	Multi Cap	311	30.8	19.6	19.7	--	12.4	Link	Link*
White Oak India Pioneers	Prashant Khemka	27-Sep-18	Multi Cap	5,341	25.1	11.8	20.0	--	18.9	Link	Link

MOAMC Founders Strategy

- Objective is to invest in Indian businesses where founders or top management have a 'Skin In The Game' and responsible for growth and success of the company.
- Investment objective is two-fold of Capital Preservation & Capital Appreciation.

Large	Mid	Small	Cash
14.3	41.5	43.7	0.5

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
16-03-2023	Vaibhav Agrawal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	46.6	27.0
SI	56.4	31.7

Time Horizon	3 Yrs +
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	24
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Top 5 Holdings Weight % = 27.2	
Script	Weight
Zomato Ltd.	7.4
Suzlon Energy Ltd.	5.2
Amber Enterprises India Ltd.	5.0
Kalyan Jewellers India Ltd.	5.0
Dixon Technologies (India) Ltd.	4.6

Top 5 Sectors Weight % = 81.6	
Sector	Weight
Capital Goods	39.8
Consumer Durables	14.6
Consumer Services	11.0
Financial Services	8.4
Realty	7.8

MOAMC Value Migration

- A Multicap strategy where manager decides Mcap allocation depending on market conditions.
- Aims for Long term compounding by investing in good businesses run by great managers.
- Companies are respective market leaders with high earnings growth.

Large	Mid	Small	Cash
19.1	42.1	38.3	0.5

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
18-02-2003	Vaibhav Agrawal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	42.8	27.0
3 Yr	25.0	16.8
5 Yr	20.3	19.6
7 Yr	16.6	15.2
SI	20.7	18.2

Time Horizon	3 Yrs +
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	24
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Top 5 Holdings Weight % = 27.3	
Script	Weight
Zomato Ltd.	7.1
Amber Enterprises India Ltd.	5.2
Suzlon Energy Ltd.	5.2
Kalyan Jewellers India Ltd.	5.0
Apar Industries Ltd.	4.9

Top 5 Sectors Weight % = 88.3	
Sector	Weight
Capital Goods	44.2
Financial Services	14.1
Consumer Services	11.4
Consumer Durables	10.1
Realty	8.5

MOAMC Mid to Mega

- Aims to deliver superior returns by investing in midcap stocks that can benefit from growth in earnings and re-rating of businesses.
- A bottom up approach identifying high quality companies, having superior growth and sustainable competitive advantage.

Large	Mid	Small	Cash
18.2	44.8	30.6	6.5

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
24-12-2019	Rakesh Tarway

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	40.3	27.0
3 Yr	21.0	16.8
SI	30.0	19.7

Time Horizon	>3 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	28
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Top 5 Holdings Weight % = 29.2	
Script	Weight
Trent Ltd.	6.7
Kalyan Jewellers India Ltd.	6.6
TVS Motor Company Ltd.	5.4
BSE Ltd.	5.3
Indian Bank	5.2

Top 5 Sectors Weight % = 73.1	
Sector	Weight
Capital Goods	20.8
Financial Services	16.1
Information Technology	14.6
Consumer Durables	13.3
Automobile and Auto	8.3

MOAMC Business Opportunities Portfolio

- BOP is a multi-cap strategy with a balanced mix of Large Cap, Mid Cap and Small Cap allocation.
- Primarily invests in consumer and financial services businesses which are expected to perform relatively better in economy which is opening-up.

Large	Mid	Small	Cash
19.4	41.4	37.9	1.3

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
18-12-2017	Vaibhav Agrawal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	32.6	27.0
3 Yr	22.4	16.8
5 Yr	20.2	19.6
SI	16.1	15.1

Time Horizon	5 Yrs +
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	24
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Top 5 Holdings Weight % = 26.9	
Script	Weight
Zomato Ltd.	7.1
Suzlon Energy Ltd.	5.2
Apar Industries Ltd.	5.0
Kalyan Jewellers India Ltd.	4.9
Amber Enterprises India Ltd.	4.7

Top 5 Sectors Weight % = 87.5	
Sector	Weight
Capital Goods	43.8
Financial Services	14.4
Consumer Services	11.4
Consumer Durables	9.7
Realty	8.2

MOAMC Next Trillion Dollar Opportunity Strategy

- A Multicap strategy focused on identifying businesses benefitting from India's growing GDP.
- The strategy aims to deliver superior returns by investing in stocks from sectors that can benefit from the Next Trillion Dollar GDP growth.

Large	Mid	Small	Cash
30.5	38.6	28.3	2.6

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
03-08-2007	Vaibhav Agrawal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	29.4	27.0
3 Yr	13.3	16.8
5 Yr	15.7	19.6
7 Yr	11.7	15.2
SI	15.8	12.4

Time Horizon	3 Yrs +
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	32
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Top 5 Holdings Weight % = 22.5	
Script	Weight
Piramal Enterprises Ltd.	6.0
Zomato Ltd.	4.6
Kalyan Jewellers India Ltd.	4.6
MCX	3.7
Bharat Heavy Electricals Ltd.	3.7

Top 5 Sectors Weight % = 79.8	
Sector	Weight
Capital Goods	32.6
Financial Services	22.7
Consumer Durables	12.7
Consumer Services	6.8
Automobile	5.0

MOAMC Ethical Strategy

- The Strategy is Shariah Certified by TASI. TASI (Taqwa advisory and Shariah Investment Solutions) is Shariah Advisory Partner of NSE. Their certification ensures 100 compliance to Shariah standards of investing.
- Portfolio Themes: Economic Recovery | Consumer Discretionary | Structural Shifts

Large	Mid	Small	Cash
31.5	36.0	20.4	12.1

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
08-06-2021	Vaibhav Agrawal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	32.5	27.0
3 Yr	18.0	16.8
SI	19.3	17.2

Time Horizon	3 Yrs +
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Year	1 st	2 nd	3 rd
Exit Load	2.0	Nil	Nil

Number of Holdings	19
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Top 5 Holdings Weight % = 31.6	
Script	Weight
Siemens Ltd.	7.1
KEI Industries Ltd.	6.8
CG Power	6.6
Global Health Ltd.	5.8
Apar Industries Ltd.	5.4

Top 5 Sectors Weight % = 76.3	
Sector	Weight
Capital Goods	37.0
Information Technology	14.0
Healthcare	10.1
Automobile	7.8
Consumer Durables	7.4

SBI AEON

- SBI AEON is an All-Weather Portfolio Strategy
- And aims a 3-in-1 portfolio with 15 - 20 stocks, which will be a combination of long-term structural ideas, medium-term tactical opportunities and active cash calls
- The fund follows a Core and Satellite approach with Investment philosophy based on Business and Management evaluation along with the Valuations

Large	Mid	Small	Cash
18.1	18.0	59.2	4.7

*Ratio	Portfolio	Nifty 50 TRI
P/E	38.0	22.7
P/B	4.9	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
21-01-2022	Gaurav Mehta

CAGR	Portfolio %	Nifty 50 TRI %
6 Months	13.5	7.8
1 Yr	27.8	21.3
SI	21.9	12.7

Time Horizon	3-5 Yrs
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Year	1 st	2 nd
Exit Load	1.0	Nil

Number of Holdings	25
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Top 5 Holdings Weight % = 30.6	
Script	Weight
Ganesh Ecosphere	7.3
Divis Lab	6.2
HDFC Bank	6.1
ICICI Bank	5.8
Muthoot Finance	5.2

Top 5 Sectors Weight % = 87.7	
Sector	Weight
Consumer Discretionary	32.1
Financials	24.5
Materials	16.4
Health Care	10.2
Consumer Staples	4.5



NEWLY LAUNCHED PMS

Marathon Trend Following

- The fund investment objective is to “Buy Strength and Sell Weakness”
- The fund avoids the Unknowns, Focus on the Known by considering factors like Currency Fluctuations, Industrial Trends, Global Macro economy and other factors.
- The funds under this scheme will get invested in growth stocks with momentum.

Large	Mid	Small	Cash
53.4	25.3	19.1	2.3

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	41.4	26.5
P/B	7.7	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
01-04-2023	Atul Suri

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	28.1	27.0
SI	41.7	31.4

Time Horizon	3-5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	Nil	Nil	Nil

Number of Holdings	21
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Top 5 Holdings Weight % = 28.9	
Script	Weight
Persistent Systems Ltd	6.3
ICICI Bank Limited	5.9
Apar Industries Ltd	5.9
Federal Bank Limited	5.5
Trent Ltd.	5.4

Top 5 Sectors Weight % = 47.1	
Sector	Weight
Industrial Products	9.3
Electrical Equipment	10.7
Pharmaceuticals & Bio	9.7
Automobiles	4.5
Finance	13.0

Renaissance Opportunities Portfolio

- A concentrated portfolio that invests in companies across businesses which are at different states of their business lifecycles.
- Fund follows framework of Sustainable Quality Growth at Reasonable Price (SQGARP).
- Capable of delivering sustainable, market-leading growth and are at a reasonable valuation.

Large	Mid	Small	Cash
81.0	10.0	8.0	1.0

*Ratio	Portfolio	Nifty 50 TRI
P/E	50.5	22.7
P/B	6.8	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
01-01-2018	Pankaj Murarka

CAGR	Portfolio %	Nifty 50 TRI %
1 Yr	30.3	21.3
3 Yr	21.0	13.8
5 Yr	21.2	16.2
SI	15.2	14.1

Time Horizon	3-5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	1.0	1.0	Nil

Number of Holdings	23
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Top 5 Holdings Weight % = 35.1	
Script	Weight
HDFC Bank Ltd	10.3
Tech Mahindra Ltd	6.9
State Bank Of India	6.6
Infosys Ltd	5.8
Info Edge (India) Ltd	5.5

Top 5 Sectors Weight % = 86.0	
Sector	Weight
BFSI	34.5
IT & Tech	21.8
Consumer Discretionary	10.3
Pharma & Chemicals	9.9
Industrials	9.5

Renaissance Midcap Portfolio

- The fund invests into midcap companies that can become large caps in the future.
- Fund follows framework of Sustainable Quality Growth at Reasonable Price (SQGARP).
- Companies with sustainable and durable business models.

Large	Mid	Small	Cash
3.0	50.0	41.0	6.0

*Ratio	Portfolio	Nifty 50 TRI
P/E	37.1	22.7
P/B	6.5	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
01-01-2018	Pankaj Murarka

CAGR	Portfolio %	Nifty 50 TRI %
1 Yr	27.9	21.3
3 Yr	26.2	13.8
5 Yr	25.1	16.2
SI	15.6	14.1

Time Horizon	3-5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	1.0	1.0	Nil

Number of Holdings	26
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Top 5 Holdings Weight % = 27.0	
Script	Weight
Federal Bank Ltd	6.1
One 97 Communications Ltd	5.5
Aditya Birla Fashion And Retail Ltd	5.4
Strides Pharma Science Limited	5.2
Syngene International Ltd	4.9

Top 5 Sectors Weight % = 84.9	
Sector	Weight
BFSI	30.3
Pharma & Chemicals	19.3
Consumer Discretionary	14.2
IT & Tech	14.1
Industrials	7.0

Buoyant Opportunities Portfolio

- Invests in largecap and smallcaps to generate superior returns with some safety (via largecaps)
- Follow a Core & Satellite framework which allows them to adopt an "Aggressive stance" when they intend to generate superior returns, and adopt a "Defensive stance" when they want to protect capital.

Large	Mid	Small	Cash
39.5	21.1	31.6	7.8

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	19.7	26.5
P/B	3.1	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
01-06-2016	Sachin Khivasara

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	23.6	27.0
3 Yr	22.3	16.8
5 Yr	27.0	19.6
7 Yr	16.7	15.2
SI	23.0	16.6

Time Horizon	3-5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	Nil	Nil	Nil

Number of Holdings	34
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Top 5 Holdings Weight % = 25.3	
Script	Weight
State Bank Of India Limited	5.9
ICICI Bank Limited	5.7
HDFC Bank Limited	5.1
Ramkrishna Forgings Limited	5.0
Indegene Limited	3.8

Top 5 Sectors Weight % = 52.9	
Sector	Weight
Banking	22.3
Insurance	9.6
Info Tech	7.4
Building Materials	7.2
HealthCare	6.4

Abakkus All Cap Approach

- A benchmark-agnostic multicap strategy that aims to generate alpha and risk adjusted returns .
- Follows MEETS Framework: Management, Earnings, Events/Trends, Timing and Structural

Large 71.9	Mid 21.2	Small 0.0	Cash 6.9
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*Ratio	Portfolio	S&P BSE 500 TRI
P/E	23.9	26.5
P/B	3.4	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
29-10-2020	Aman Chowhan

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	22.1	27.0
3 Yr	18.1	16.9
SI	30.2	24.6

Time Horizon	>5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	1.5	Nil	Nil

Number of Holdings	26
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Top 5 Holdings Weight % = 27.7	
Script	Weight
Bharti Airtel PP Limited	6.2
Sun Pharma	5.6
HCL Technologies Limited	5.6
State Bank Of India	5.2
Larsen And Toubro Limited	5.1

Top 5 Sectors Weight % = 58.6	
Sector	Weight
Banks	14.9
Industrials	13.0
NBFC	11.5
Telecommunication	10.3
Commodities	9.0

Abakkus Emerging Opportunities Approach

- Invests in midcap and smallcaps which aims to generate alpha for a 3-5 year holding period
- The fund follows bottom-up fundamental research based investing

Large 22.7	Mid 65.3	Small 8.2	Cash 3.9
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*Ratio	Portfolio	S&P BSE 500 TRI
P/E	22.9	26.5
P/B	2.3	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
26-08-2020	Aman Chowhan

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	35.0	27.0
3 Yr	26.1	16.9
SI	39.0	23.9

Time Horizon	>5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	1.5	Nil	Nil

Number of Holdings	30
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Top 5 Holdings Weight % = 29.0	
Script	Weight
Anup Engineering Limited	8.8
Sarda Energy And Minerals Limited	6.0
Ion Exchange India Limited	5.1
Federal Bank Limited	4.8
PNB Housing Finance Limited	4.3

Top 5 Sectors Weight % = 57.8	
Sector	Weight
NBFC	14.7
Banks	12.3
Industrial Manufacturing	11.6
Commodities	9.9
Industrials	9.3

Abakkus Diversified Alpha

- The funds follows a unique 40:30:20:10 approach to portfolio construction.
- Aims to capture opportunities across market capitalization keeping in mind liquidity management as smaller capitalization companies have incrementally smaller weights.

Large 49.0	Mid 19.1	Small 15.7	Cash 16.2
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*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
16-01-2024	Aman Chowhan

CAGR	Portfolio %	S&P BSE 500 TRI %
6 Months	9.0	7.9
SI	14.7	12.5

Time Horizon	>5 Yrs
--------------	--------

Year	1 st	2 nd	3 rd
Exit Load	1.5	Nil	Nil

Number of Holdings	29
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Top 5 Holdings Weight % = 20.6	
Script	Weight
HDFC Bank Limited	4.2
PNB Housing Finance Limited	4.2
Jubilant Pharmova Limited	4.1
Bharti Airtel Limited	4.1
Larsen And Toubro Limited	4.0

Top 5 Sectors Weight % = 57.8	
Sector	Weight
Banks	18.7
Nbfc	15.6
Commodities	10.4
Health Care	6.6
Telecommunication	6.5

Alchemy High Growth PMS

- A multicap strategy aiming for consistent and superior long term absolute returns by Investing in growth companies with good management teams.
- Invests in businesses which have a competitive advantage in effectively exploiting large and growing external opportunities, and have ROCE > Average ROCE.

Large 28.0	Mid 37.0	Small 33.0	Cash 2.0
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*Ratio	Portfolio	S&P BSE 500 TRI
P/E	38.7	26.5
P/B		4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
08-05-2002	Hiren Ved

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	24.1	27.0
3 Yr	14.0	16.8
5 Yr	13.0	19.6
7 Yr	8.6	15.2
SI	21.1	17.4

Time Horizon	3-5 Yrs
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Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	20 - 25
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Top 5 Holdings Weight % = 31.4	
Script	Weight
Bharat Electronics Ltd	7.6
Sobha Ltd	6.7
Prestige Estates Projects Ltd	6.7
Suzlon Energy	5.5
Natco Pharma	4.9

Top 5 Sectors Weight % = 78.7	
Sector	Weight
Industrials	30.7
Real Estate	16.9
Consumer Discretionary	12.8
Health Care	9.7
Financials	8.5

Alchemy Smart Alpha 250 PMS

- A multicap strategy which follows a proprietary eQGP framework in order to identify top companies.
- The philosophy of the product is to get aggressive in a risk-on environment and defensive in a risk-off environment. Risk in environment is ascertained based on their multiple factors.

Large 32.0	Mid 50.0	Small 16.0	Cash 2.0
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*Ratio	Portfolio	S&P BSE 500 TRI
P/E	NA	26.5
P/B	NA	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
10-08-2023	Alok Agarwal

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	37.6	27.0
SI	40.5	25.3

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	20-25
--------------------	-------

Top 5 Holdings Weight % = 29.9	
Script	Weight
Dixon Technologies India Ltd	8.0
Trent Ltd	7.0
Power Finance Corporation Ltd	5.7
PB Fintech Ltd	5.1
Divis Lab	4.1

Top 5 Sectors Weight % = 81.7	
Sector	Weight
Consumer Discretionary	25.7
Industrials	21.0
Financials	18.0
Information Technology	9.1
Health Care	7.9

UNIFI Blended Rangoli

- The fund investment objective is to focus on identifying unique investment opportunities.
- The aim is to generate superior (risk adjusted) returns with due emphasis on capital preservation.
- Risk management framework include in-depth stock reviews, exposure limits, and marketable liquidity assessment.

Large 38.0	Mid 13.0	Small 49.0	Cash -
---------------	-------------	---------------	-----------

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	28.0	26.5
P/B	6.3	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
01-07-2017	Mr. Sarath Reddy

TWRR	Portfolio %	S&P BSE 500 TRI %
1 Yr	19.6	27.0
3 Yr	15.5	16.8
5 Yr	30.8	19.6
SI	21.9	15.5

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	Nil	Nil	Nil

Number of Holdings	20-25
--------------------	-------

Top 5 Holdings Weight % = 28.5	
Script	Weight
Bank Of Baroda	7.5
ITC Ltd	7.5
NCC Ltd	5.0
Zensar Technologies Ltd	5.0
Coromandel International Ltd	3.5

Top 5 Sectors Weight % = 74.5	
Sector	Weight
Consumer	21.5
IT	16.5
Financials	14.5
Healthcare	11.5
Infrastructure	10.5

Narnolia 5T PMS: Industry Champs

- A largecap strategy comprising companies that are leaders in their respective operating industries.
- 80% of portfolio companies from Nifty Large cap 100 Index.
- Companies with higher than nominal GDP growth (>12), ROE >= 20 and undervalued v/s 10Yr average valuations.

Large	Mid	Small	Cash
77.1	8.0	13.3	1.6

*Ratio	Portfolio	Nifty 50 TRI
P/E	26.7	22.7
P/B	--	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
28-03-2012	Shailendra Kumar

CAGR	Portfolio %	Nifty 50 TRI %
1 Yr	31.8	21.3
3 Yr	13.0	13.8
5 Yr	16.9	16.2
7 Yr	13.9	14.4
SI	17.3	14.3

Time Horizon	>5 Yrs
--------------	--------

Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	21
--------------------	----

Top 5 Holdings Weight % = 38.2	
Script	Weight
Mahindra & Mahindra	8.6
HDFC Bank	8.2
Bharti Airtel	8.1
State Bank of India	7.4
Zen Technologies Ltd	6.0

Top 5 Sectors Weight % = 98.4	
Sector	Weight
Consumers	27.3
Financials	27.2
Industrial	30.0
Global	13.9

Narnolia 5T PMS: Mid & Small Cap Strategy

- Companies mainly from Nifty Mid-Smallcap 400 index with high quality moats and high growth.
- Companies with higher than nominal GDP growth (>18), ROE >= 20 and undervalued v/s 10Yr average valuations.
- In the market cycle, when expansion phase occurs these Mid & Small Caps may provide higher return.

Large	Mid	Small	Cash
6.9	13.5	67.8	11.8

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	33.6	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
04-05-2015	Shailendra Kumar

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	31.7	27.0
3 Yr	19.4	16.8
5 Yr	24.8	19.6
7 Yr	18.4	15.2
SI	21.2	14.7

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	26
--------------------	----

Top 5 Holdings Weight % = 30.6	
Script	Weight
MCX Ltd.	9.6
NH	5.9
VST Tillers Tractors Ltd	5.4
AMI Organics	4.9
TVS Motors	4.7

Top 5 Sectors Weight % = 88.1	
Sector	Weight
Consumers	29.3
Financials	20.4
Industrial	22.8
Global	15.6

Narnolia 5T PMS: Multi Cap Strategy

- Multicap investing provides opportunity to invest across diversified industries.
- 80 of portfolio companies from Nifty 500 Index.
- Provides sufficient margin of safety in terms of current valuation vs average last ten years valuation.

Large	Mid	Small	Cash
50.2	21.3	26.8	1.7

*Ratio	Portfolio	Nifty 50 TRI
P/E	26.8	22.7
P/B	--	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
28-03-2012	Shailendra Kumar

CAGR	Portfolio %	Nifty 50 TRI %
1 Yr	18.5	21.3
3 Yr	9.7	13.8
5 Yr	14.2	16.2
7 Yr	10.0	14.4
SI	16.4	14.3

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	24
--------------------	----

Top 5 Holdings Weight % = 33.8	
Script	Weight
HDFC Bank	8.0
Mahindra & Mahindra	6.9
State Bank of India	6.4
Bharti Airtel	6.3
Larsen & Toubro	6.2

Top 5 Sectors Weight % = 98.3	
Sector	Weight
Consumers	23.8
Financials	29.6
Industrial	35.3
Global	9.6

Narnolia 5T PMS: 5T x 5T Strategy

- This strategy focuses on themes that should form part of India's next growth engine.
- A unique theme-based investing opportunity to capitalize on India's GDP approaching USD 5 trillion.
- Expects Mcap of companies to grow by 11-12 CAGR

Large	Mid	Small	Cash
45.6	11.5	37.5	5.3

*Ratio	Portfolio	Nifty 50 TRI
P/E	26.7	22.7
P/B	--	3.7

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
04-05-2015	Shailendra Kumar

CAGR	Portfolio %	Nifty 50 TRI %
1 Yr	23.0	21.3
3 Yr	13.2	13.8
5 Yr	18.0	16.2
7 Yr	15.3	14.4
SI	17.3	13.2

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	1.0	Nil	Nil

Number of Holdings	22
--------------------	----

Top 5 Holdings Weight % = 33.7	
Script	Weight
HDFC Bank	8.5
State Bank of India	8.1
ICICI Bank Ltd	6.1
ACE	5.7
Larsen & Toubro	5.2

Top 5 Sectors Weight % = 94.5	
Sector	Weight
Consumers	28.3
Financials	26.7
Industrial	21.3
Global	14.8
Cyclicals	3.6

ICICI Prudential PIPE Strategy

- Focuses on investing in small and mid-cap companies at the time of investment – stocks that harbour potential for significant expansion.
- Aims to identify companies with earnings potential that are benefitting from both earnings growth and P/E rating.

Large	Mid	Small	Cash
--	19.5	78.9	1.6

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	22.0	26.5
P/B	2.8	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
05-09-2019	Anand Shah

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	31.9	27.0
3 Yr	31.9	16.8
5 Yr	33.6	19.6
SI	32.1	21.1

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	3.0	2.0	1.0

Number of Holdings	37
--------------------	----

Top 5 Holdings Weight % = 26.1	
Script	Weight
Sarda Energy and Minerals Ltd	7.8
Karur Vysya Bank Ltd	4.8
Jindal Stainless Ltd	4.7
GE Vernova T&D India Limited	4.5
Indian Bank	4.4

Top 5 Sectors Weight % = 51.0	
Sector	Weight
Ferrous Metals	16.5
Banks	11.6
Auto Components	8.1
Industrial Products	7.5
Retailing	7.2

ICICI Prudential Contra Strategy

- Seeks to generate capital appreciation by investing predominantly in stocks through contrarian investing. For defensive consideration, it may invest in debt and money market mutual fund schemes.
- Aims to select companies in sectors that have high entry barriers, sectors that are in the consolidation phase or companies that are in a special situation.

Large	Mid	Small	Cash
68.6	15.1	15.7	0.6

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	18.9	26.5
P/B	2.7	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
14-09-2018	Anand Shah

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	31.1	27.0
3 Yr	25.3	16.8
5 Yr	25.7	19.6
SI	21.7	16.0

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd
Exit Load	1.0	Nil

Number of Holdings	30
--------------------	----

Top 5 Holdings Weight % = 32.5	
Script	Weight
Bharti Airtel Ltd	7.4
ICICI Bank Ltd	7.1
Larsen & Toubro Ltd	6.7
State Bank of India	5.9
Vedanta Ltd	5.4

Top 5 Sectors Weight % = 60.5	
Sector	Weight
Banks	27.9
Ferrous Metals	11.8
Telecom - Services	7.4
Construction	6.7
Finance	6.7

INVESCO Dawn Strategy

- D: Demand recovery across cyclical & consumer discretionary sectors
- A: Attractive valuation to provide Margin of Safety
- W: Winning companies on the cusp of a new demand cycle leading to operating & financial leverage efficiencies
- N: New credit & investment cycle to provide a boost to earnings recovery

Large	Mid	Small	Cash
64.4	20.7	9.4	5.6

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	23.9	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
28-08-2017	Neelesh Dhamnaskar

CAGR	Portfolio %	S&P BSE 500 TRI %
1 Yr	30.8	27.0
3 Yr	19.6	16.8
5 Yr	19.7	19.6
SI	12.4	15.6

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	Nil	Nil	Nil

Number of Holdings	25
--------------------	----

Top 5 Holdings Weight % = 28.4	
Script	Weight
ICICI Bank Ltd.	6.8
Zomato Ltd.	5.8
Rural Electrification Corp Limited	5.7
Infosys Ltd.	5.3
National Aluminium Co. Ltd.	4.8

Top 5 Sectors Weight % = 81.6	
Sector	Weight
Financials	26.4
Consumer Discretionary	18.4
Materials	15.1
Industrials	13.2
HealthCare	8.5

White Oak India Pioneers Equity Portfolio

- Long only strategy with bottom-up stock selection approach.
- The investment philosophy is, that outsized returns are earned over time by investing in great businesses at attractive values.
- Research underpinned on a 'proprietary analytical model' honed over two decades; replicable across markets and businesses

Large	Mid	Small	Cash
59.4	15.3	24.8	0.5

*Ratio	Portfolio	S&P BSE 500 TRI
P/E	--	26.5
P/B	--	4.3

Source: AMC | As on 30th Nov, 2024 | *Ratio mentioned is 1yr Trailing.

Launch	Fund Manager
09-Apr-19	Prashant Khemka

TWRR	Portfolio %	S&P BSE 500 TRI %
1 Yr	25.1	27.0
3 Yr	11.8	16.8
5 Yr	20.0	19.6
SI	18.9	17.1

Time Horizon	3-5 Yrs
--------------	---------

Year	1 st	2 nd	3 rd
Exit Load	Nil	Nil	Nil

Number of Holdings	84
--------------------	----

Top 5 Holdings Weight % = 27.3	
Script	Weight
ICICI Bank Ltd	8.2
HDFC Bank Ltd	7.7
Tata Consultancy Services Ltd	4.3
State Bank Of India	3.8
Bharti Airtel	3.3

Top 5 Sectors Weight % = 71.1	
Sector	Weight
Consumer Disc	15.0
Information Tech	8.9
Financials	32.0
Industrials	11.1
Materials	4.1

Portfolio Actions (1st Nov'24 to 30th Nov'24) – (1/3)

<u>PMS</u>	<u>Added</u>	<u>Exited</u>	<u>Allocations Increased</u>	<u>Allocations Reduced</u>
MOAMC Value	--	--	Bharat Dynamics eMudhra Waaree Energies	Kalyan Jewellers Kaynes Technology Premier Energies
MOAMC NTDOP	PolyCab India Waaree Energies	Chambal Fertilisers & Chemicals	Suzlon Energy APL Apollo Tubes Hero Motocorp	BSE Ltd
MOAMC BOP	--	--	Archean Chemical Industries Waaree Energies	Kalyan Jewellers Kaynes Technology Premier Energies
MOAMC M2M	--	--	--	BSE Ltd
MOAMC Ethical	--	--	--	--
MOAMC Founders	--	--	PTC Industries Radico Khaitan Waaree Energies	Dixon Technologies Kalyan Jewellers Kaynes Technology
SBI AEON	--	--	--	--
Marathon Trend Following	ABSLAMC	Britannia Industries	--	--

Portfolio Actions (1st Nov'24 to 30th Nov'24) – (2/3)

<u>PMS</u>	<u>Added</u>	<u>Exited</u>	<u>Allocations Increased</u>	<u>Allocations Reduced</u>
Renaissance Opportunities	--	--	Wipro Tata Steel	--
Renaissance Midcap	--	--	Federal Bank	Nuvama Cummins India
Buoyant Opportunities	Camlin Fine Sciences Ltd	--	Indus Towers Ltd Manappuram Finance Ltd Bharat Petroleum Corporation	Max Financial Services HDFC Bank Alldigi Tech Ltd Star Health
Abakkus AACA	NA	NA	NA	NA
Abakkus EOA	NA	NA	NA	NA
Abakkus DAA	NA	NA	NA	NA
Alchemy High Growth	GE Vernova Persistent Systems	Tata Power Cochin Shipyard	--	--
Alchemy Smart Alpha	Zomato Persistent Systems Coforge	HAL, RVNL Cochin Shipyard	--	--

Portfolio Actions (1st Nov'24 to 30th Nov'24) – (3/3)

<u>PMS</u>	<u>Added</u>	<u>Exited</u>	<u>Allocations Increased</u>	<u>Allocations Reduced</u>
Narnolia Industry Champs	JUBLPHARMA ADANI PORTS	ASTRAL	--	LIQUIDCASE
Narnolia Mid & Small Cap	JYOTICNC ZAGGLE	CMSINFO	--	KAYNES JUSTDIAL
Narnolia Multi Cap	FEDERALBNK AUROPHARMA AVALON JYOTICNC	RATEGAIN VINATI ORGA DRREDDY CMSINFO	--	--
Narnolia 5Tx5T	MEDIASSIST AVALON	BRITANNIA ALICON	ADANI PORTS	LIQUIDCASE
ICICI PIPE	NA	NA	NA	NA
ICICI Contra	NA	NA	NA	NA
Invesco DAWN	Lupin	NHPC	--	--
White Oak India Pioneers Equity Fund	Firstsource Solutions Angel One	Tata Steel India Mart FSN E-Commerce Ventures Senco Gold	--	--

Overlap of Stocks within offerings – HOW TO READ

Stock Universe	# of Stocks
Universe of Stocks	292
Unique # of Stocks	161
# of Stocks common (Count)	131

There are **161** unique of stocks out of total **292** stocks

Read the Table Horizontally

Strategies (Total # of stocks)	Largecap PMS				
	Invesco DAWN (25)	Narnolia Industry Champs (20)	Marcellus CCP (16)	Marcellus KCP (14)	Renaissance Opportunities (24)
Invesco DAWN (25)	4(12%)	4(17%)	2(6%)	3(15%)	7(29%)
Narnolia Industry Champs (20)	4(23%)	3(9%)	5(25%)	3(18%)	6(39%)
Marcellus CCP (16)	2(18%)	5(38%)	2(6%)	4(27%)	1(9%)
Marcellus KCP (14)	3(29%)	3(39%)	4(44%)	4(13%)	3(32%)
Renaissance Opportunities (24)	7(31%)	6(33%)	1(6%)	3(15%)	3(9%)

Note: Unique Stocks along with Allocation are Highlighted in Black Colour Cell

Total # of stocks in PMS

If a client has 2 PMS' : Renaissance Opp & Narnolia Industry Champs, then there is an overlap of **6 stocks** of Renaissance Opp Strategy (with **33% allocation**) with Narnolia Industry Champs.

Out of 161 Unique stocks, there are **3 stocks** in Renaissance Opp (with **9% allocation**) which are unique and not present in any of our other offered Largecap PMS'.

Overlap of Stocks within offerings – Multicap PMS

Stock Universe	# of Stocks
Universe of Stocks	311
Unique # of Stocks	163
# of Stocks common (Count)	148

Strategies (Total No. of stocks)	Abakkus DAA (29)	Buoyant Opportunities (34)	ICICI Contra (30)	Invesco DAWN (25)	Marathon Trends (20)	MOAMC BOP (24)	MOAMC Ethical (19)	MOAMC Founders (24)	MOAMC NTDOP (32)	Narnolia 5Tx5T (21)	Narnolia Industry Champs (21)	Renaissance Midcap (26)	SBI AEON (21)	White Oak Pioneers (83)
Abakkus DAA (29)	3(5%)	6(22%)	9(32%)	5(16%)	3(9%)	1(3%)	0(0%)	1(3%)	3(10%)	3(12%)	5(20%)	1(3%)	1(4%)	8(27%)
Buoyant Opportunities (34)	6(22%)	16(35%)	6(24%)	6(22%)	2(8%)	2(5%)	2(4%)	1(2%)	2(6%)	5(22%)	4(19%)	1(4%)	3(13%)	6(22%)
ICICI Contra (30)	9(44%)	6(33%)	2(5%)	6(27%)	1(7%)	0(0%)	0(0%)	1(2%)	2(14%)	5(27%)	7(37%)	0(0%)	2(12%)	11(47%)
Invesco DAWN (25)	5(20%)	6(26%)	6(25%)	6(18%)	3(16%)	1(6%)	1(3%)	1(6%)	5(22%)	4(22%)	4(19%)	1(3%)	2(12%)	7(30%)
Marathon Trends (20)	3(14%)	2(11%)	1(6%)	3(15%)	1(4%)	3(16%)	3(15%)	2(11%)	2(11%)	2(10%)	3(15%)	2(10%)	1(6%)	8(41%)
MOAMC BOP (24)	1(4%)	2(7%)	0(0%)	1(7%)	3(13%)	1(3%)	4(16%)	17(75%)	14(63%)	1(7%)	1(4%)	1(4%)	0(0%)	6(28%)
MOAMC Ethical (19)	0(0%)	2(8%)	0(0%)	1(5%)	3(17%)	4(22%)	4(16%)	3(15%)	6(25%)	0(0%)	0(0%)	2(10%)	1(4%)	1(7%)
MOAMC Founders (24)	1(3%)	1(4%)	1(3%)	1(7%)	2(8%)	17(72%)	3(11%)	1(4%)	12(53%)	1(7%)	2(9%)	1(4%)	0(0%)	5(22%)
MOAMC NTDOP (32)	3(10%)	2(5%)	2(7%)	5(16%)	2(6%)	14(43%)	6(19%)	12(41%)	3(8%)	2(8%)	4(12%)	1(3%)	1(2%)	8(25%)
Narnolia 5Tx5T (21)	3(22%)	5(31%)	5(33%)	4(25%)	2(12%)	1(5%)	0(0%)	1(5%)	2(10%)	3(12%)	7(40%)	1(4%)	2(15%)	8(44%)
Narnolia Industry Champs (21)	5(32%)	4(26%)	7(41%)	4(28%)	3(16%)	1(2%)	0(0%)	2(9%)	4(20%)	7(39%)	2(7%)	0(0%)	3(17%)	12(64%)
Renaissance Midcap (26)	1(6%)	1(6%)	0(0%)	1(4%)	2(9%)	1(4%)	2(5%)	1(4%)	1(4%)	1(3%)	0(0%)	12(38%)	0(0%)	1(5%)
SBI AEON (21)	1(6%)	3(17%)	2(12%)	2(12%)	1(6%)	0(0%)	1(4%)	0(0%)	1(4%)	2(12%)	3(18%)	0(0%)	14(59%)	4(21%)
White Oak Pioneers (83)	8(18%)	6(23%)	11(29%)	7(23%)	8(16%)	6(8%)	1(2%)	5(7%)	8(13%)	8(30%)	12(36%)	1(1%)	4(16%)	43(37%)

Note: Unique Stocks along with Allocation are Highlighted in Black Color Cell

Overlap of Stocks within offerings – Large, Mid & Smallcap

Stock Universe	# of Stocks
Universe of Stocks	311
Unique # of Stocks	163
# of Stocks common (Count)	148

Strategies (Total No. of stocks)	Abakkus AACA (26)	Abakkus AEOA (30)	ICICI Pipe (37)	MOAMC Mid to Mega (28)	Narnolia Mid & Small Cap (25)	Narnolia Multi Cap (24)	Renaissance Opportunities (23)	Value PMS (23)
Abakkus AACA (26)	7(14%)	7(25%)	1(5%)	2(8%)	1(2%)	4(21%)	5(25%)	0(0%)
Abakkus AEOA (30)	7(19%)	9(29%)	2(10%)	1(3%)	1(3%)	1(5%)	1(5%)	0(0%)
ICICI Pipe (37)	1(5%)	2(13%)	22(43%)	1(4%)	1(3%)	1(4%)	0(0%)	0(0%)
MOAMC Mid to Mega (28)	2(6%)	1(2%)	1(5%)	6(13%)	3(10%)	2(7%)	1(3%)	8(33%)
Narnolia Mid & Small Cap (25)	1(3%)	1(3%)	1(3%)	3(11%)	5(18%)	7(25%)	0(0%)	3(14%)
Narnolia Multi Cap (24)	4(25%)	1(3%)	1(4%)	2(9%)	7(21%)	1(4%)	6(34%)	2(6%)
Renaissance Opportunities (23)	5(26%)	1(3%)	0(0%)	1(5%)	0(0%)	6(33%)	2(9%)	0(0%)
Value PMS (23)	0(0%)	0(0%)	0(0%)	8(37%)	3(14%)	2(11%)	0(0%)	0(0%)

Note: Unique Stocks along with Allocation are Highlighted in Black Color Cell

Humbled to receive Multiple Awards

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500

Consistently featured in
'Fortune 500 (India)' from 2020
to 2023

India
Forbes
Super 50
Companies

Featured in **'Forbes Super 50
Companies'** in 2017.

CNBC
TV18
IBLA

Awarded **'Brand of the Year'** at
the CNBC TV18 - India Business
Leadership Awards 2018.



Inducted into the **'HALL OF
FAME'** at the CNBC 10th Financial
Advisor Awards 2019.

Limca
LIMCA
BOOK of
RECORDS

Enters the Limca Book of
Records for creating **India's
Largest Dealing Room** in 2009.

**Asia Money
Brokers Poll**

Consistently **ranked among
the top 3 for Best Brokerage
(India)** for over a decade at the
Asiamoney Brokers Poll.

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