

RH INDIA BUSINESS LEADERS



ABOUT

Actively managed large cap portfolio, having ~60% weight from Nifty, and balance from broader index to provide additional alpha.

Benchmark aligned sectoral exposure in large cap growth companies.

PERFORMANCE

	6M	1Y	3Y	5Y	Since Mar'19	SI
STRATEGY	-18.64%	-4.51%	9.97%	16.10%	12.92%	10.32%
NIFTY 50 TRI	-11.98%	1.89%	10.93%	15.96%	12.82%	13.07%

STRATEGY DETAILS

STRATEGY	RH IBL
BENCHMARK	NIFTY 50 TRI
Since Inception of Current Fund Management Team	MAR'19
Since Inception	NOV'12

TOP 5 HOLDINGS

SECURITY	WEIGHTS
Trent Ltd.	9.48%
ICICI Bank Ltd.	6.99%
Max Healthcare Institute Limited	6.38%
Reliance Industries Ltd.	6.24%
Coforge Ltd.	5.47%

TOP 5 SECTOR

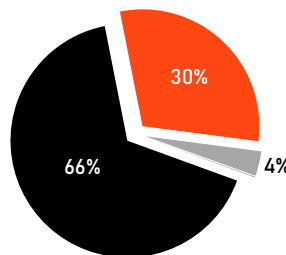
Financial Services	29%
Consumer Services	13%
Information Technology	13%
Automobile and Auto Components	10%
Capital Goods	8%

SCHEDULE OF CHARGES

Min Investment	Rs. 50 Lakhs
Management Fee Structure	1) Fixed Fee 2) Hybrid Fee 3) Performance Fee
Exit Load	Year One: 2% Year Two: 1%

M-CAP SPLIT

■ Large Cap ■ Mid Cap ■ Small Cap

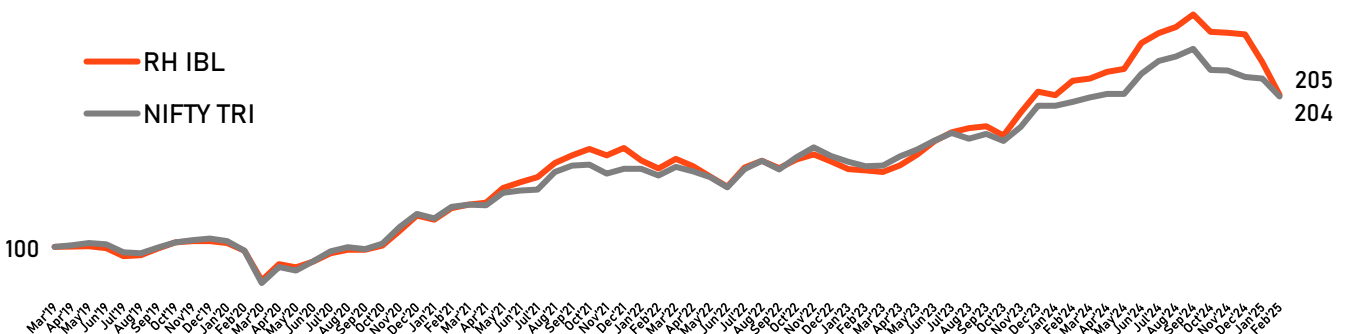


RISK RATIOS

Metrics	Strategy	Benchmark
Standard Deviation	15.22%	15.17%
Beta	0.93	1.00
Sharpe Ratio	0.99	0.78
Treynor Ratio	0.16	0.12

**All risk ratios have been calculated since the inception of the current Fund Management Team

NAV GRAPH OF STRATEGY SINCE INCEPTION OF CURRENT FUND MANAGEMENT TEAM



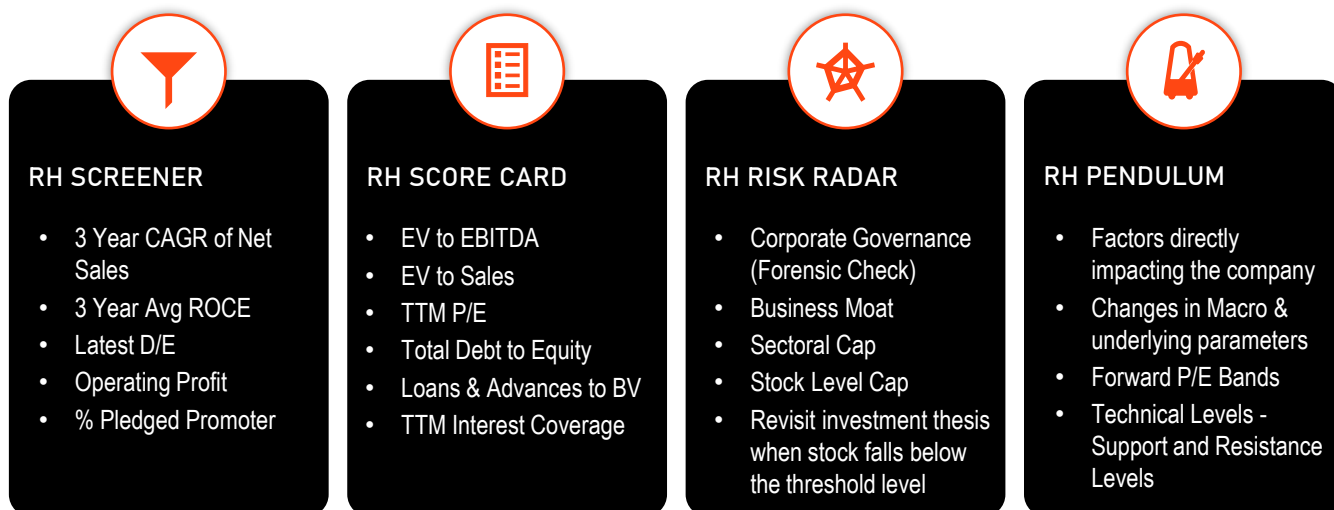
RIGHT HORIZONS PMS

RH PMS is a discretionary Portfolio Management Services firm, started operations in 2012, after years of rigorous fundamental & technical research by the Right Horizons Group before inception. Over this period, we have developed an expertise in picking stocks that can do well on a risk-adjusted basis which is also demonstrated in our portfolio performance during volatile market conditions. The Fund Management Team has a combined experience of more than forty years in investment and research and is headed by Mr. Anil Rego, who is a seasoned investor of more than twenty years of investing experience and is supported by CFAs, IIT and IIM graduates.

RH FUND HOUSE PHILOSOPHY

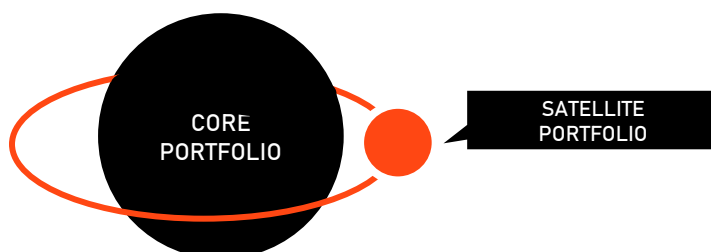
"We strive to deliver a superior risk-adjusted return through a robust risk management methodology, using a structured investment process and an in-depth Fundamental and Quantitative Analysis framework."

RH INVESTMENT PROCESS



CORE & SATELLITE PORTFOLIO

- Core Portfolio: Capital Efficient high growth companies (~80% portfolio allocation)
- Satellite Portfolio: Turnaround stories/ Contrarian bets having a higher margin of safety and greater risk-reward potential (~20% portfolio allocation)



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