RIGHT HORIZONS
guiding you in achieving your goals

NOV’25

PORTFOLIO MANAGEMENT SERVICES

Portfolio Management is the Art and Science of selecting the Right Investment Instruments in the Right Proportion to generate Optimum Returns Balancing Risk

The Essence Of Investment Management Is The Management Of Risk, Not Just The Management Of Returns

1. **Our Philosophy and How We Do It @ RH**
2. **Overview Of Our PMS Schemes**
3. **About RH, Our Values and Our Team**
4. **Why RH ??**
   Terms For Investment

RH FUND HOUSE INVESTMENT 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.

[RHSIP] -
RH STRUCTURED INVESTMENT PROCESS

RH SCREENER [RHS]

Screening from a Universe of 1300 companies based on key parameters like ROE, RoCE, PAT Growth, Promoter holding, etc.

RH PENDULUM [RHP]

Our Stock Rebalancing framework governed by both Fundamental levels and opportunistic technical levels

RH SCORECARD [RHSC]

Stock Evaluation Framework & Scorecard built using weightages given to Valuation and Return Ratios, Forensic Filters and selected line items from Financial statements

RH RISK RADAR [RHRR]

Our Risk Evaluation Criteria and Radar to factor in Regulatory Changes, to capture Business Risk, to limit sector and Stock Level Exposure and to rebalance Portfolio

[RHS] - RH SCREENER

1 Investment Universe

- High level Screening from a Universe of 1300+ Companies
- Existing & Emerging Companies across Market Cap

2 CRITERIA 1 – KEY BUSINESS METRICS

- 3 Year CAGR of Net Sales
- 3 Year Avg ROCE
- Latest D/E, Operating Profit, % Pledged Promoter, Market Cap

3 Criteria 2 – Ideas For Turnaround / Growth Triggers

- Turnaround / Growth Triggers / Potential Disruptors
- Sectors with Tailwinds
- Strategic Qualitative Moat & Upcoming Leaders

4 FINAL SHORTLIST

- Companies Qualifying Benchmarks
- Companies Qualifying Benchmark 2
- Potential Mapping to PMS Strategy / Theme

[RHSC] - RH SCORECARD

- Turnaround Triggers
- Companies with Growth Triggers / Potential Disruption
- Sectors with tailwinds
- Strategic/ qualitative Moat
- Upcoming Leaders

- Promoters Pledging
- Promoters Holding
- Change in Institutional Holding
- Credit Rating
- Dividend Yield

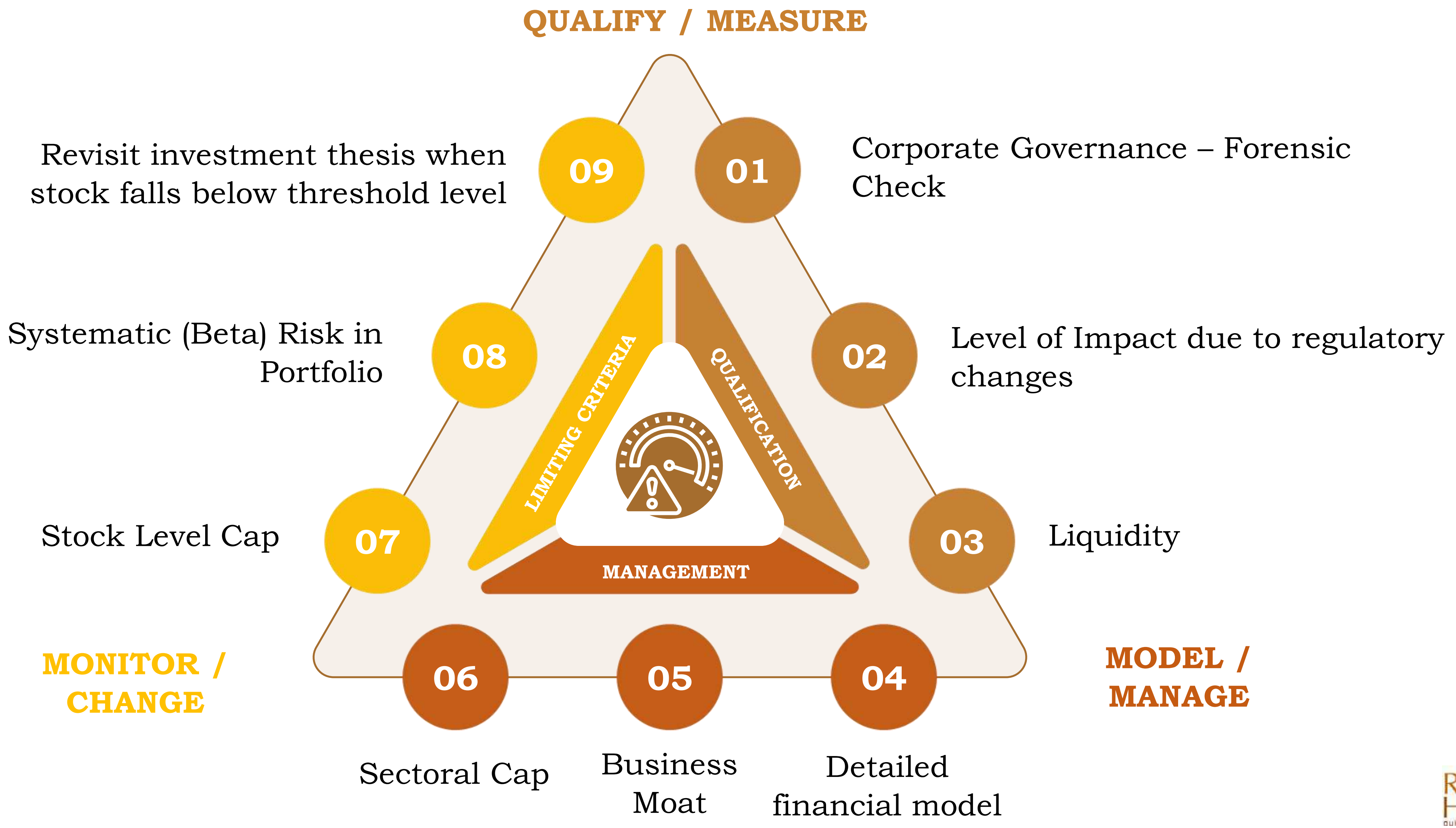
- ROE 5 Yr Avg
- ROCE 5 Yr Avg
- Asset Turnover Ratio

- Net Sales Growth - 3 Yrs CAGR
- Net Operating Profit Growth -3 Yrs CAGR
- PAT Growth 3 Yrs - 3 Yrs CAGR

- EV to EBITDA
- EV to Sales
- TTM P/E
- TTM P/B
- TTM P/S

- Total Debt to Equity
- Loans & Advances to Book Value
- TTM Interest Coverage

[RHRR] - RH RISK RADAR FRAMEWORK



[RHP] - RH PENDULUM

Factors directly impacting the company -
Changes in Macro & Underlying Parameters

Technical Levels - Support and
Resistance Levels

If Stock Price decline is
more than 15%

Macro Factors / Changes

Fundamental levels
- Forward P/E Bands

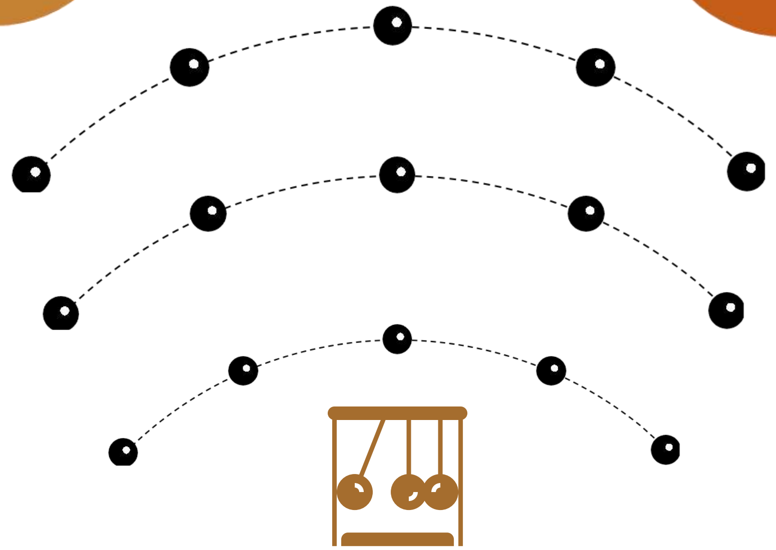
Technicals

Stock Price Decline

If decline is more than
25% compared to the
Benchmark Index

Fundamentals

Decline vs Benchmark



- Price Band Target Radar
- Portfolio Review Radar
- Stock Price Review Radar

RH ALPHABOTS

A Diversified Large Cap Oriented Scheme With A Unique AI Based Investment Strategy

RH ALPHABOTS

RH AlphaBots – India Prime Portfolio

A Large Company* focused fund, aiming to deliver superior risk adjusted return using Artificial Intelligence Engine** for stock selection.

** Large Company defined as companies with Market Cap over Rs 10,000 Cr*

*** The Artificial Intelligence Engine (AlphaBots) is provided by AlphaBlock*

- AlphaBlock is an AI company with a vision to build cross domain applications
- AlphaBots is the engine designed by AlphaBlock in the investing domain; AlphaBots is an AI framework which delivers AI processes capable of generalizing the portfolio construction process
- The company has also developed a blockchain solution capable of embedding any AI process inside a smart contract. By embedding an AI process in a blockchain it becomes immutable
- The outcome of any decisions made by the AI process requires no external verification of its validity
- Third party validation or (alpha generating) attribution is usually required for performance claims in the financial services industry.

RH ALPHABOTS EXECUTIVE SUMMARY

A fully automated fintech solution to

1. Deliver alpha (risk weighted excess returns) for any investment mandate and
2. Recording all portfolio generation, performance and its attribution on IPFS (decentralized database) using an intelligent smart contract.

Active investment strategies have been finding it very difficult to create alpha versus the benchmark

There is no replicable AI solution out there today which can reduce cost, assume market risk and generate alpha across financial and non-financial assets

Competitive Advantage of Product:

1. The **unique AI methodology**, which is developed and improvised over the years by a team of researchers and data scientists- and demonstrated performance

2. This advantage is driven by our **Systematic, Scientific, Replicable methodology** which works across assets, regions, styles and mandates- live across 11 strategies in US, Europe & India

3. **High risk weighted excess returns** (alpha) in US market, over the past 5 years, where 90% of asset managers don't outperform, net of costs

What Makes the Product Unique ?

- **Generalized by design** (Goes beyond financial factors)
- **Factor Agnostic** (Fama & French Factors)-This is why conventional factors like value, momentum, size, quality, volatility etc. are inconsistent in their behavior and hence fail to perform.
- **Looks at Portfolio value as a function of selection**, **weight and duration**
- Low Frequency rebalancing; i.e. monthly, quarterly or yearly.
- Replicable across many geographical markets, which demonstrates the robustness of the AI framework.
- Not affected by behavioural biases like Representative bias, Home bias etc

INVESTMENT METHODOLOGY

Information Content	Structure
Factor Specific	Factor Agnostic
Individual Stock selection based on fundamental ratios (P/E)	Relative Position and movement of the components given its character vs the group
Fundamental factor model based on Book Value, size, momentum etc.	Multi- durational analysis of group or stock

A domain agnostic Algorithmic framework which works on information structure (probabilistic behavior of a component in its group) and not on information content (e.g. fundamental factors for stocks).

Investment Process;

a. Selection: identify which stock to buy,
b. Weighting; decide how much of the stock to buy, and
c. Duration: understanding when to sell the stock.

- The funds are built on a **statistical framework which is systematic, scientific and replicable**
- **The methodology is factor agnostic** and studies the relative position and dynamics of a component in its group across multi durations.
- **Selections and exits are based on probabilistic scores** which are enhanced using machine learning.

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AI ENGINE PROCESS FLOW

Data Integration	Data Processing	Risk Management	Investing
General AI Engine takes both structured and unstructured data in its repository	AI Engine Process the data in repository and anticipate future behaviour of data	Unique insights allows us to mitigate risk by identifying worrisome opportunities	Insights given by our AI Engine can allow us to capitalize on future opportunities

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RH ALPHABOTS INDIA PRIME PORTFOLIO

- Invests up to 100% in equities
- Universe of companies with Market Cap over Rs 10,000 Cr
- Rebalances predominantly quarterly
- Sector agnostic
- Cap of 20% in any one stock; 40% in any one sector
- Benchmarked to BSE 200 Index

RH ALPHABOTS
INVEST WITHOUT BIAS

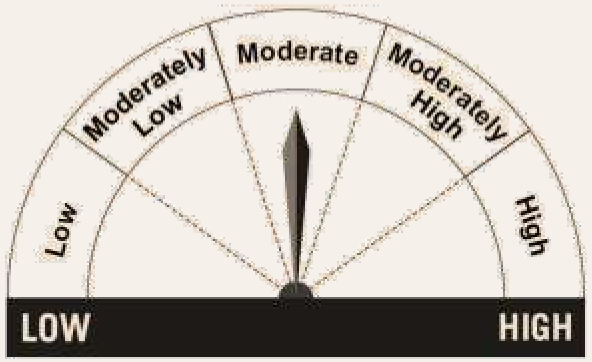
Key Features:

- Manager diversification through investing in an AI Based Portfolio in stocks.
- Investing in low frequency, benchmark agnostic large companies

Investment Suitability:

- Ideal for investors looking AI Based Strategy
- Suitable for investors with low to moderate risk appetite and looking for low - mid teen returns

Risk-O-Meter:.



Scheme Matrix:

Growth	Blend	Value	
	✓		Large
			Medium
			Small

RH ALPHABOTS INDIA 100

PORTFOLIO HOLDINGS

Portfolio Holdings (Top 5)	Weight (%)
Hindustan Aeronautics Ltd	3.82%
Eternal Ltd	3.81%
IDFC First Bank Ltd	3.42%
Persistent Systems Ltd	3.27%
HDFC Bank Ltd	3.11%

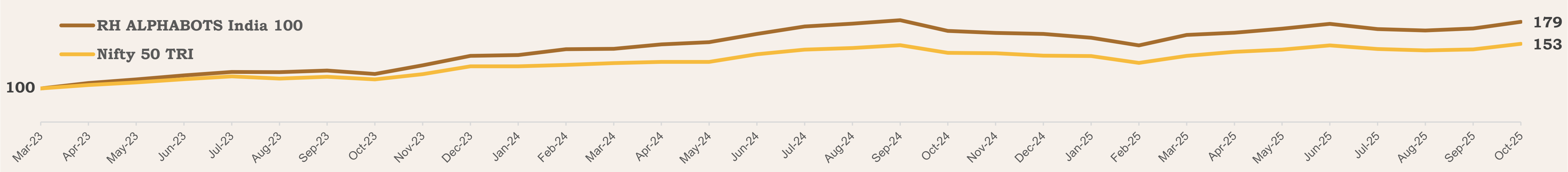
PORTFOLIO SECTOR ALLOCATION

Sector	Allocation
Financial Services	25%
Capital Goods	17%
Consumer Services	10%
Information Technology	8%
Fast Moving Consumer Goods	6%
Automobile and Auto Components	5%
Healthcare	4%
Oil Gas & Consumable Fuels	3%
Chemicals	3%

TIME PERIOD	RH ALPHABOTS	NIFTY 50 TRI
1 Month	4.63%	4.62%
3 Months	5.07%	4.15%
6 Months	7.70%	6.69%
1 Year	6.36%	7.59%
2 Year	23.68%	17.52%
Since Inception (Mar'23)	25.30%	17.90%

*Returns above 1 year are Annualized

GROWTH OF RS.100 INVESTED IN RH ALPHABOTS INDIA 100 & NIFTY 50 TRI

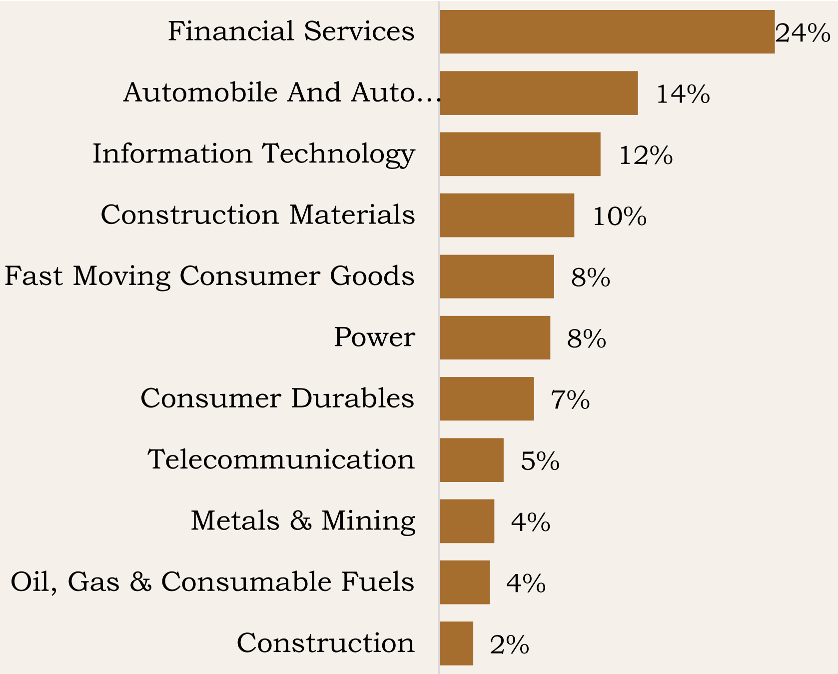


RH ALPHABOTS LARGECAP 30

PORTFOLIO HOLDINGS

Portfolio Holdings (Top 5)	Weight (%)
Mahindra & Mahindra Ltd	7.03%
Ultratech Cement Ltd	6.36%
Bajaj Finserv Ltd	4.95%
Hindustan Unilever Ltd	4.93%
Bharti Airtel Ltd	4.67%

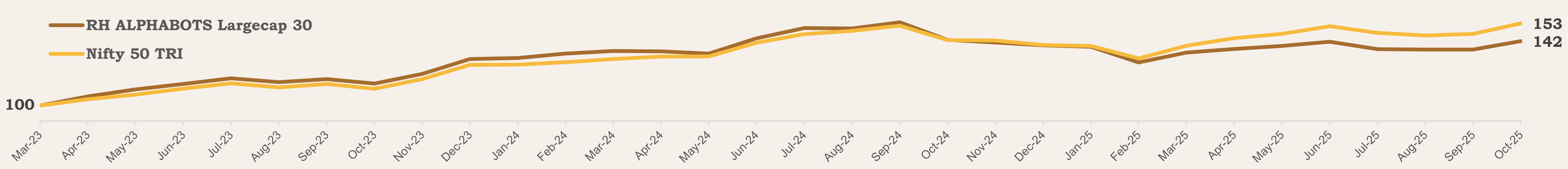
PORTFOLIO SECTOR ALLOCATION



TIME PERIOD	RH ALPHABOTS	NIFTY 50 TRI
1 Month	3.94%	4.62%
3 Months	3.82%	4.15%
6 Months	3.73%	6.69%
1 Year	-0.53%	7.59%
2 Year	11.33%	17.52%
Since Inception (Mar'23)	14.39%	17.90%

*Returns above 1 year are Annualized

GROWTH OF RS.100 INVESTED IN RH ALPHABOTS LARGECAP 30 & NIFTY 50 TRI

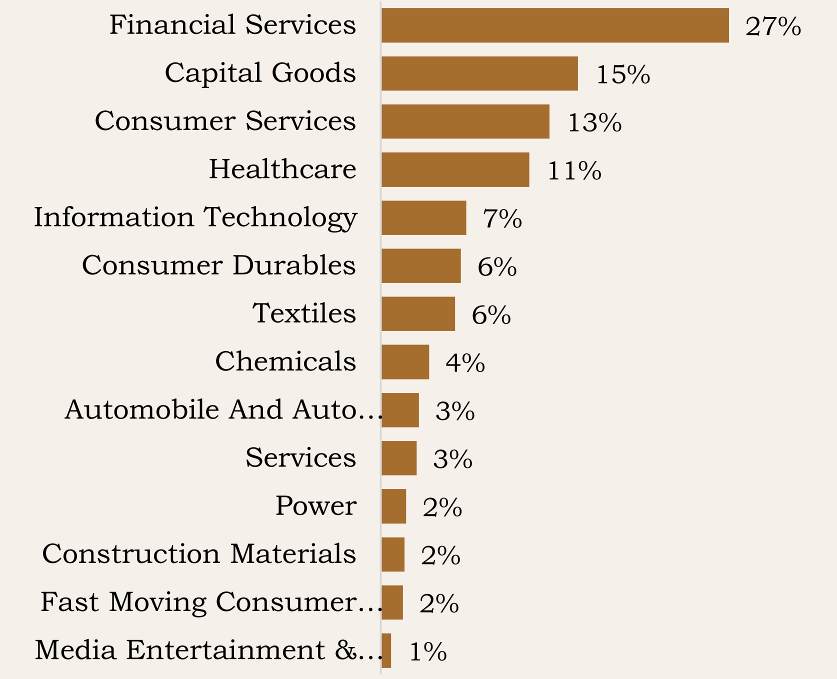


RH ALPHABOTS MIDCAP 29

PORTFOLIO HOLDINGS

Portfolio Holdings (Top 5)	Weight (%)
Bharat Electronics Ltd	8.78%
AU Small Finance Bank Ltd	6.72%
Persistent Systems Ltd	6.53%
Indian Hotels Co Ltd	5.73%
Page Industries Ltd	5.68%

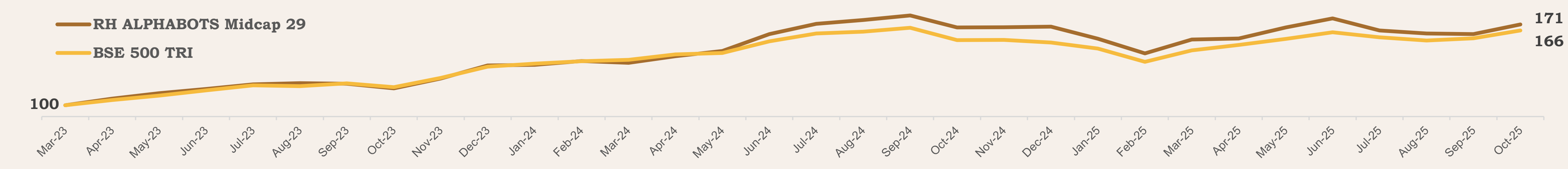
PORTFOLIO SECTOR ALLOCATION



TIME PERIOD	RH ALPHABOTS	BSE 500 TRI
1 Month	5.27%	4.27%
3 Months	3.20%	3.72%
6 Months	7.85%	8.33%
1 Year	1.52%	5.32%
2 Year	22.07%	19.63%
Since Inception (Mar'23)	23.13%	21.62%

*Returns above 1 year are Annualized

GROWTH OF RS.100 INVESTED IN RH ALPHABOTS MIDCAP 29 & BSE 500 TRI

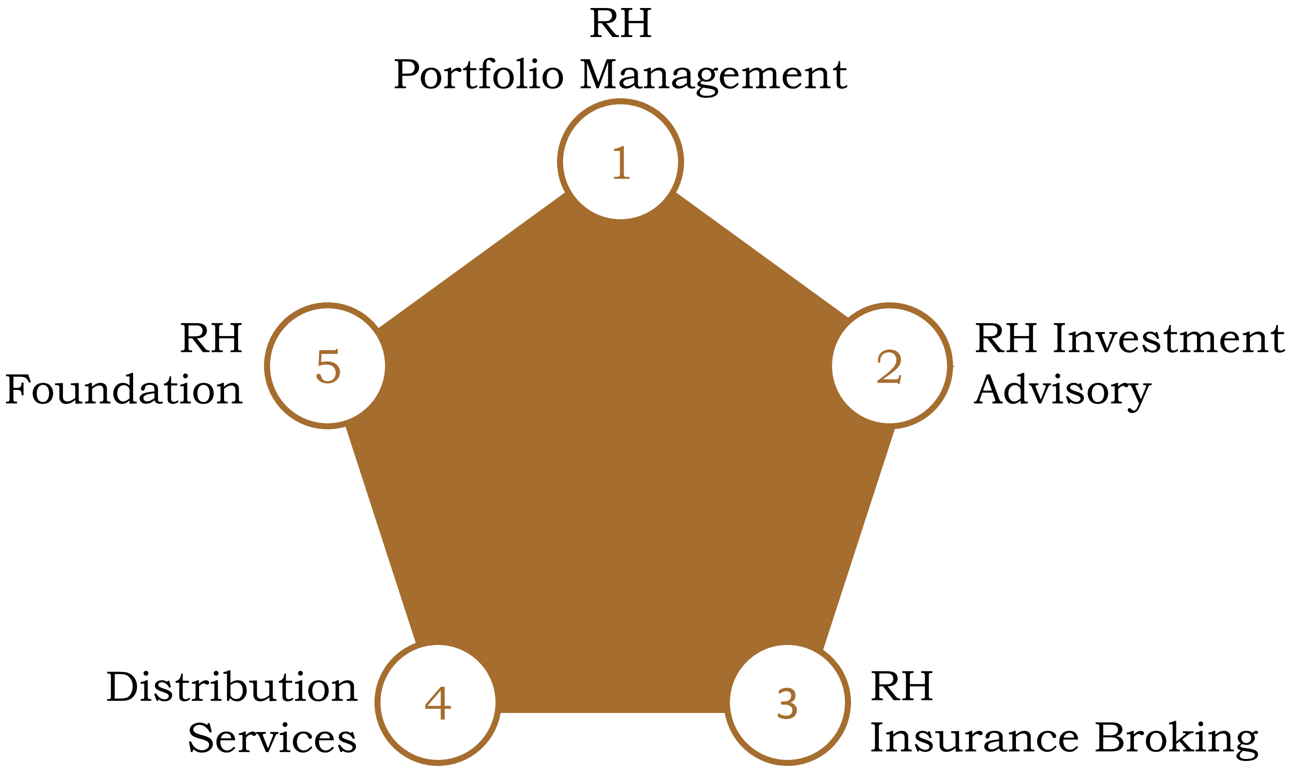


RH STRATEGY WISE INVESTMENT APPROACH

STRATEGY	INVESTMENT APPROACH
RH ALPHABOTS INDIA 100	• Investment Objective is to achieve long term capital appreciation through Smart Alpha strategy fund by investing in 'listed securities' in India through AI framework that is systematic, scientific and replicable across assets, regions, styles and mandates • Investment Philosophy is a Large Cap focused fund, aimed at delivering superior risk adjusted return using AI Engine for dynamic weighting of components in the benchmark
RH ALPHABOTS INDIA LARGECAP 30	• Investment Objective is to achieve long term capital appreciation through Smart Alpha strategy fund by investing in 'listed securities' in India through AI framework that is systematic, scientific and replicable across assets, regions, styles and mandates • Investment Philosophy is a Large Cap focused fund, aimed at delivering superior risk adjusted return using AI Engine for dynamic weighting of components in the benchmark
RH ALPHABOTS INDIA MIDCAP 29	• Investment Objective is to achieve long term capital appreciation through Smart Alpha strategy fund by investing in 'listed securities' in India through AI framework that is systematic, scientific and replicable across assets, regions, styles and mandates • Investment Philosophy is a Mid Cap focused fund, aimed at delivering superior risk adjusted return using AI Engine for dynamic weighting of components in the benchmark

RH GROUP

- Right Horizons is a 21+ year young organization with clientele spread across the world.
- The Right Horizons Group is focused across the investment advisory, asset management, risk management and distribution value chain.
- RH manages an AUA of Rs 5,000+ Cr across 7 branches, supported by a team of 85+ professionals.
- Right Horizons is one of the Top 5 Leading Financial Advisory Companies with 95%+ retention rate reflecting a satisfied client base.



21+ Years in Business

85+ Employees

5000+ INR Crores AUA

Top Ranked PMS Schemes

OUR CORE VALUES

Building TRUST across stakeholders is the foundation of our values

T	R	U	S	T
Transparency	**R**espect	**U**nbiased	**S**ustainability	**T**eamwork

FOUNDER, MD & CIO

Mr. Anil Rego

CIO, Strategist, Speaker,
Personal Finance Expert,
Author & Philanthropist

- A seasoned Investor for over 3 decades, following a contrarian style
- Chartered Financial Analyst & MBA from ICFAI
- Corporate Experience in Business Planning, Corporate Finance, Mergers & Acquisition with Wipro Technologies.
- A Regular & Featured Speaker on Business Television Channels and a regular Contributor to Articles in Print and Online media.
- Guest Faculty at Leading Management Institutions.
- A Panelist at various International Conferences, Seminars, Symposiums and Global Events.
- Author having Penned his own Experiences which is a Bestseller "Honey, I Lost All Our Money!"
- Philanthropist making a difference to the Underprivileged
- Had a Dream of Retiring from corporate life at the Age of 30; on a mission to help others dream Big and achieve their goals

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RH PMS BOARD

Rachna Rego
- Promoter & Director

- 10 year in Right Horizons on Research, financial planning , Training , Compliance , Quality, Process and IT implementations , Heads Sales
- Visiting faculty in Business Schools in the areas of Information Technology and Human Behaviors
- 14 years experience in Wipro and Infosys on Delivery Management

Shankar Jaganathan
- Director

- Author, Economic historian, Business Advisor & Guest Faculty
- Founder & CEO at Cimplyfive Corporate
- 18 years in Wipro; Corporate Treasurer
- Author of books “Corporate Disclosures”; “The Wisdom of Ants”
- Head Academics and Technology Initiatives at Azim Premji Foundation

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OUR TEAM OF CERTIFIED EXPERTS

Prabhat Ranjan, CFA –
Co-Fund Manager

- Over five years of experience in equity and investment research
- B.Tech from BVP, Pune and MBA from Delhi School of Economics
- CFA charter holder from CFA Institute, USA
- Covers Manufacturing, Cement, Chemicals and Automotive among other sectors at Right Horizons
- Previous: Investment & Research Associate at Client Associates

Vijay Chauhan-
Co-Fund Manager

- B.Tech from IIT and MBA from IIM
- Covers Financial Services, Pharma, IT and Consumer amongst other sectors.
- Previously, raised the capital with other partners from Surat based Investors; invested in Indian Small Cap and Mirco Cap Companies

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WHY RH PMS?

01

DISCIPLINED INVESTMENT PROCESS

Structured Quantitative and Qualitative Framework & Methodologies

02

STRONG RISK MANAGEMENT

Strong Emphasis on Compliance & Risk Management

03

CONTRARIAN APPROACH

Based on deep understanding of market cycles

04

EXPERIENCED TEAM

Certified and Credentialed Team with 500+ Man Years of Experience

05

CUSTOMIZED SERVICES

Services Customized to Client Needs & Regular Updates on Events through Infographics and Notes

06

CUSTOMER CENTRIC MODEL

Single Point of Contact with direct Access to Fund Manager

INVESTMENT APPROACH

RH Alphabots	
Strategy	RH Alphabots
Benchmark	BSE 500 TRI
Portfolio Manager	Anil Rego
Minimum portfolio size	INR 5 Million
Recommended holding horizon	36 months +
Risk level	Medium - High
Set Up Fees	Nil
Fees	Option 1 (Variable): 1.25% p.a. calculated using monthly average balance plus variable fees. Option 2 (Fixed): 2.5% annual, calculated using monthly average account balance
Variable Fee	15% profit share over hurdle rate of 10% (Applicable only for option 1)
Exit Load	2% & 1% for year 1 & 2, respectively

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RH PMS BACK OFFICE & TRANSACTION COSTS

DP & Back office

DEMAT A/C with	HDFC BANK
Custodian details	HDFC Bank Custodian
Fund Accounting	HDFC Bank Fund Accounting
NRI - Restriction	No
Audit firm details	Venkatesh Reddy and Team
Back Office Provider	RH Internal Software

Transaction Costs

Transaction Charges (A)	0.02% on the settlement value subject to a minimum of Rs.50/- per transaction & a maximum of Rs.100/- per transaction
Custodian Fees (B)	0.035% P.A. on average AUM
Fund Accounting Fees (C)	0.035% P.A. on average AUM
Audit Statement Charges (INR) (D)	885
Total Account Charges (A+B+C+D)	0.09% to 0.12% on average AUM (for AUM of Rs 1 cr or more)

Portfolio Liquidation

Client Request → RM +FM Approval → Liquidating the portfolio (T+1) → Deduction of fees → Closure Process

Note: Typically, for partial redemption and pay-out it takes T+3 days to transfer the funds to personal account.

RH PMS MEDIA COVERAGE

moneycontrol
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Home > News > Business > MUTUAL FUNDS

23 stocks from top 5 PMS schemes that outperformed Nifty in November, worth a look

As many as 218 PMS schemes from the broader markets generated better returns than Nifty 50 in November. Here's a quick look at some of their main stock holdings for the month

GAURAV SHARMA | DECEMBER 15, 2021 / 01:42 PM IST

PMS schemes cater to wealthy investors with portfolio sizes exceeding Rs 50 lakh. Their professional fee structure is different from that of regular mutual funds.

Of 269 schemes tracked by pmsbazaar.com in November, 218 generated better returns than the Nifty 50, the data shows. There were 46 schemes that generated positive returns even though the benchmark index witnessed a decline.

Six schemes generated more than 2 percent returns last month, led by Right Horizons – Super Value Fund (+4.58 percent), Silver Arch – Small and Mid Cap Equity Fund (+3.70 percent), Systematix – Dynamic Investment Portfolio (+3.35 percent), Sageone – Small & Microcap fund (+2.75 percent), Composite Investments Pvt Ltd – Emerging Star Fund (+2.65 percent), and Carnelian Asset Advisors – Shift Strategy (+2.18 percent).

However, not all of these top schemes disclosed their stock holdings for November. Moneycontrol has collated a list of the top five from among those that have disclosed their holdings.

Right Horizons – Super Value Fund

Primarily focusing on midcaps, this scheme generated the highest returns of 4.58 percent among all PMS schemes in November. Its top five stocks were Apollo Pipes Ltd, Neogen Chemicals Ltd, KEI Industries Ltd, Polycab India Ltd and Dixon Technologies Ltd.

pmsbazaar
MILLION to BILLION

PMS / AIF Compariso

8 out of 10 PMSes Out-Performed Nifty in November

The Indian stock benchmark Nifty 50 fell 3.9% in November, but the declines in the broader market were gentler. Midcaps fell 2.7% while smallcaps were largely flat. Naturally, PMS strategies that usually spread their bets across the market performed better. As many as 219 PMSes out-performed the Nifty 50 in November, i.e. almost 83% of the PMS strategies tracked by PMS Bazaar. Due to the lop-sided nature of market performance this month, the best performing PMS strategies belonged to midcap, small & midcap, multicap, smallcap buckets. Here is a recap.

Best strategies of the month

Headlines of a quicker than expected Fed tapering & new Covid-19 variant set off nervousness in stock markets in November. And with markets trading near all-time highs, both in terms of levels and historical valuations, a mild sell-off ensued.

Given that it was a negative month for equities, the top-10 performers totally bucked the trend and delivered reasonable positive gains to investors. Leading the pack was Right Horizons Super Value strategy. This is midcap scheme with almost a 3 year vintage. The PMS gained 4.58% in November, a handsome 700 basis point alpha over Nifty Midcap 100 (down 2.69%). Number 2 this month was Silverarch Mid & Small Cap Equity with 3.7% gain, followed by Systematix Dynamic Investment Portfolio at no. 3 with its multicap theme generating 3.35%.

November Month Top 10 Performing PMSes

PORTFOLIO MANAGER	STRATEGY	CATEGORY	1 MONTH RETURNS
RIGHT HORIZONS	SUPER VALUE	MID CAP	4.58%
SILVERARCH	MID & SMALL CAP EQUITY	SMALL & MIDCAP	3.70%
SYSTEMATIX	DYNAMIC INVESTMENT PORTFOLIO	MULTI CAP	3.35%
SAGEONE	SMALL & MICROCAP	SMALL CAP	2.75%
COMPOSITE INVESTMENTS PRIVATE LIMITED	EMERGING STAR FUND	SMALL & MIDCAP	2.65%
CARNELIAN ASSET ADVISORS	SHIFT STRATEGY	MULTI CAP	2.18%
GREEN PORTFOLIO	DIVIDEND YIELD	THEMATIC	1.91%
CENTRUM PMS	GOOD TO GREAT	MID CAP	1.68%
SILVERARCH	INDIA EQUITY PORTFOLIO	MULTI CAP	1.68%
WIZE MARKET ANALYTICS	CAPITAL MIND - LONG TERM PORTFOLIO	MULTI CAP	1.48%

As on 30th - Nov - 2021

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RH PMS MEDIA COVERAGE

Business Standard

Most PMS schemes in red, but more than 80% outperform Nifty in November

The schemes returned -2% on average, better than the -3.9% generated by the benchmark

Topics
PMS schemes | Nifty50 | NSE Nifty50 benchmark index

It was a tough month for PMS schemes with the majority of them ending in the red. However, 218 out of 262 schemes, or 83 per cent, outperformed the Nifty50 in November.

The schemes returned -2 per cent, on average, better than the -3.9 per cent generated by the benchmark. The top performing strategies for the month included Right Horizon's Super Value (4.6 per cent), followed by Silverarch's Mid & Small Cap Equity (3.7 per cent) and Systematix's Dynamic Investment Portfolio (3.35 per cent), the data from PMS Bazaar showed. Among the individual categories, ...

Making money for the wealthy: 20 PMS schemes gave 50-100% return in just 6 months

PMS schemes that gave more than 50 percent return include Nine River Capital's AURUM Smallcap theme that delivered nearly 95 percent return in the last six months

20 PMS SCHEMES THAT HAVE RALLIED MORE THAN 50% FROM MARCH-END

AMC	STRATEGY NAME	CATEGORY	6 Months
NINE RIVERS CAPITAL	AURUM SMALL CAP OPP	SMALL CAP	94.90%
EQUIRUS SECURITIES ###	LONG HORIZON FUND	SMALL & MIDCAP	94.44%
KARMA CAPITAL ADVISORS	LONG ONLY INDIA PUBLIC EQUITY	MULTI CAP	83.30%
MONEYLIFE	MAS GROWTH	MULTI CAP	80.11%
NEGEN CAPITAL	SMALL CAP EMERGING	SMALL CAP	78.18%
ACCURACAP	PICOPOWER	SMALL CAP	71.66%
CENTRUM PMS	MULTIBAGGER (DEEP VALUE I)	MID CAP	63.30%
CENTRUM PMS	DEEP VALUE IV	MID CAP	60.90%
RIGHT HORIZONS	MINERVA INDIA UNDER-SERVED	SMALL CAP	57.70%
MOTILAL OSWAL	IOP V2	SMALL & MIDCAP	57.03%
CENTRUM PMS	GOOD TO GREAT	MID CAP	55.70%
MOTILAL OSWAL	FOCUSED MIDCAP	MID CAP	54.44%
CENTRUM PMS	MICRO	SMALL CAP	54.20%
ASIT C MEHTA INVESTMENT INTERMEDIATES	ACE MULTICAP	MULTI CAP	53.80%
ANAND RATHI ADVISORS	IMPRESS PMS	MULTI CAP	53.18%
CREST WEALTH MANAGEMENT	SMALLCAP	SMALL CAP	52.90%
INVESCO	RISE	MULTI CAP	51.60%
MARCELLUS	LITTLE CHAMPS	SMALL CAP	51.80%
SATCO CAPITAL MARKETS ##	GROWTH & MOMENTUM	MULTI CAP	50.50%
QUEST INV ADVISORS	MULTI	MULTI CAP	50.40%

Source: PMSBazaar.com
moneycontrol

Top PMS Performance (Yearly): December 2021

HOME > BLOGS > TOP PMS PERFORMANCE (YEARLY): DECEMBER 2021

Top PMS Performance

We bring you the list of the top five PMS Performers of 20 in the category- Large Cap, Mid Cap, Small Cap, and Multi-Cap:

Large-cap

The first position is backed by none other than SageOne, with a 59.9% return. Right Horizons are also stuck to the second position with 48.11%. The third position remains the same with ICICI Prudential, with a 38.5% return.

AMC & Scheme Name	1M	3M	6M	1Y
SageOne – Large-cap Portfolio	-2.3%	-0.7%	14.2%	59.9%
Right Horizons- India Business	-2.87%	3.35%	16.22%	48.11%
ICICI Prudential – Largecap Strategy	-5.5%	-4.7%	6.8%	38.5%
Aditya Birla – Top 200 Core Equity Portfolio	-1.79%	1.08%	13.24%	37.32%
Alchemy – Leaders	-4.7%	-2.9%	17.9%	34.8%

Mid-cap

The first position remains the same, with Nafa having a 104% return. At the same time, the second and third positions are interchanged between Right Horizon on second and Invesco at third.

AMC & Scheme Name	1M	3M	6M	1Y
NAFA – EMERGING BLUECHIP PORTFOLIO	3%	15%	34%	104%
Right Horizons -Super-Value Fund	4.58%	13.90%	27.10%	82.98%
Invesco India – Caterpillar Potfolio	-2.4	13.31	28.74	75.9%
SageOne – Core Portfolio	-0.9%	-1.3%	16.3%	64.3%
SageOne – Diversified Portfolio	0.0%	0.9%	17.3%	59.6%

Small-cap

Beating Roha, Aequitas has secured the first position with 103.71%. Roha stepped down to the second position with 90.54%. Third position is with Right Horironz with 85.1%.

AMC & Scheme Name	1M	3M	6M	1Y
Aequitas Equity Fund – Equity Scheme	-8.12	-1.26	29.09	103.71%
Roha – Emerging Champions Portfolio	-2.89%	0.55%	21.89%	90.54%
Right Horizons -Minerva India Under-served	-8.3%	-6.9%	46.6%	85.1%
NAFA – SMALL CAP PORTFOLIO	2%	12%	29%	84%
Abakkus Emerging Opportunities Approach	-2.9	1.8	16.3	83.7

Thank you!

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