



### Alpha Bluechip

RIA-Renaissance Smart Tech Private Limited

Horizon	3-5 Years
Inception Date	01 Jun 20
Benchmark	Nifty 200
Benchmark Returns	<b>+103.21%</b>
Methodology	Fundamental
No. of Stocks	20-25

## Subscription Mode

- 2% p.a. ( Half yearly at 1% for 6 months on daily average AUA)
- Investment Universe : Multicap
- Top up Rs. 1,00,000
- Brokerage : 0.50%

## Portfolio Characteristics

- Identify stocks through various filters & in-depth research
- Bottom – up fundamental research approach
- MEETS framework evaluation for stock selection
- Max sector exposure is 30%
- Risk Appetite - Aggressive



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**buoyant** **Buoyant Opportunities Flexicap**  
RIA-Buoyant Capital Private Limited

Horizon	3-5 Years
Inception Date	24 Jul 23
Benchmark	Nifty 500
Benchmark Returns	+103.26%
Methodology	FUNDAMENTAL RESEARCH
No. of Stocks	Upto 20

## Subscription Mode

- 2% p.a. ( Half yearly at 1% for 6 months on daily average AUA)
- Investment Universe : Multicap
- Top up Rs. 1,00,000
- Brokerage : 0.50%

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## Portfolio Characteristics

- Identifies opportunities from universe of 5,000 listed stocks which have Market cap greater than Rs. 1,000 Crores.
- Quant model tries to identify potential opportunities of over 30% in individual stocks by setting Expected Price and range for every stock basis quarterly data.
- Risk management includes maximum sector exposure at 20%.
- Construct Portfolio with Price to Earnings(PE) ratio being lower than Nifty Price to Earnings(PE) ratio.
- When a stock reaches its Expected price set for the quarter, we advise to exit.
- Benchmark Nifty 50
- Risk Appetite Aggressive

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## NS Industry Champ

RIA-Narnolia Investment Advisors Pvt Ltd.

Horizon	3-5 Years
Inception Date	02 Apr 20
Benchmark	Nifty 100
Benchmark Returns	+29.34%
Methodology	Fundamental
No. of Stocks	10-20

## Subscription Mode

- 2% p.a. ( Half yearly at 1% for 6 months on daily average AUA)
- Investment Universe : Multicap
- Top up Rs. 1,00,000
- Brokerage : 0.50%



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## Portfolio Characteristics

- Investment in the industry leaders, Companies with good governance practices and dynamic management team to navigate business cycles.
- Portfolio will consist of 10-20 stocks; mostly large-cap
- Bottom up research of business financials, management strategies and Companies that have improving/higher return ratio.
- Uniquely designed risk management framework to generate superior risk adjusted returns
- Risk Appetite - Conservative
- Investment horizon of minimum 3-5 years.
- Benchmark - Nifty Large and Mid-250

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## Disclaimer & Risk Factors:

We have taken and continue to take utmost care and caution in compilation of current and historic data (such as performance of portfolio managers, investment approaches followed and/or AUM of portfolio managers etc.) we also take due care in analysis (such as making comparisons etc.) of the data. The information and data provided BY Aastha fintech on its website and newsletters (including any of its publications/e-mails/newsletters) have been obtained and culled out of whatever is available on public domain/provided by portfolio managers either on their own or at the request of Aastha fintech and we do not in any way guarantee the accuracy [(in general and as well as with respect to regulatory compliance (s)), reliability, completeness, current-ness and/or timeliness of any errors or omissions in such information, data (including regulatory non-compliances, if any) and/or analysis of such information and data nor for the results obtained by any user of website (including any publications/e-mail/newsletters of Aastha fintech) from use of such content, information, data, analysis, software, text, graphics, links or communications provided on the website or for any monetary or other damage suffered by you on account of such usage.

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