Investment Advisory

Power Portfolio

OVERVIEW

Power Portfolio is non-discretionary Investment advisory product. Its a long-only, balanced and concentrated portfolio.

It comprises the 10 best large-cap stocks of the day for long-term wealth creation.

Power Portfolio aims to outperform the CNX Nifty 50, with relatively lower volatility in the portfolio and moderate churn.

INVESTMENT STRATEGY

- The product seeks to outperform through superior selection of well researched, quality companies to build a well-balanced, diversified portfolio.
- It is a moderate-risk, moderate-churn portfolio with a maximum sector exposure of 30% each in in a maximum of three stocks
- Investments are equally divided into ten stocks with10% allocation to each stock

PRICING & PRODUCT FEATURES

- Minimum investment of Rs. 5 lakh
- Charges
  - ➢ 1% per annum; AMC fee charged based on daily NAV.
  - ➢ 0.5% brokerage.
  - ➢ NO Profit sharing & NO Lock-in period for investments.

Power Portfolio Performance (as on October 31, 2020)

Duration	Power Portfolio*	Nifty 50
1 Month	**1.7%**	3.5%
3 Month	**4.6%**	5.1%
6 Month	**19.7%**	18.1%
1 Year	**-2.7%**	-2.0%
2 Year	**7.4%**	12.1%

**Aggregate Returns are calculate on TWRR method*

TOP 5

Client	Inception Date	Power Portfolio return	Nifty 50 return
Client 1	21-03-16	113.2%	51.1%
Client 2	16-03-16	112.6%	55.3%
Client 3	17-03-16	108.3%	55.0%
Client 4	11-07-16	90.5%	37.5%
Client 5	23-03-16	85.3%	50.9%
Note : Top 5 outperformer client Vs benchmark