

STAR MODEL PORTFOLIO

OVERVIEW

STAR Model Portfolio is non discretionary product.

A well balanced multi-cap portfolio for long term wealth creation.

STAR aims to outperform the BSE 200 through superior selection of well researched companies to create a high quality portfolio.

INVESTMENT STRATEGY

- Disciplined investment decision are taken in companies having market cap over Rs5,000 crore from Sharekhan Fundamental Research universe.
- The product seeks to achieve the outperformance through superior selection of well researched, quality companies to build a well balanced, diversified portfolio.
- It is a moderate-risk, moderate -chum portfolio with sector Exposure 30% max exposure/ 3 stocks from preferred sectors.
- Investments are Equally divided into ten stocks with 10% allocation in each stock

PRICING & PRODUCT FEATURES

- Minimum investment of Rs. 5 lakh
- Charges
 - 0.5% brokerage on every trade executed.
 - No annual maintenance charge
 - No Profit sharing & no Lock-in period for investments.

STAR Model Portfolio Performance (as on March 31, 2021)

Duration	STAR Model Portfolio*	BSE 200
1 Month	1.8%	1.2%
3 Month	5.4%	6.5%
6 Month	26.1%	31.5%
1 Year	60.6%	74.3%
2 Year	14.4%	13.6%

Note : Returns taken from Miles System based on TWRR method; 2 year and above returns are CAGR basis

TOP 5

Client	Inception Date	STAR Model Portfolio Returns	BSE 200 Returns
Client 1	29-06-18	94.9%	36.5%
Client 2	16-10-18	80.5%	39.5%
Client 3	09-10-18	79.9%	44.3%
Client 4	03-01-19	72.4%	37.6%
Client 5	25-09-18	66.5%	33.4%

Note : Top 5 outperformer client Vs benchmark

