

STAR PORTFOLIO

OVERVIEW

STAR Portfolio is non discretionary Investment advisory product.

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

STAR aims to outperform the BSE 200, with relatively lower volatility in the portfolio and moderate churning.

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 -churn 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
 - 1% per annum; AMC fee charged based on daily NAV.
 - 0.5% brokerage on every trade executed.
 - NO Profit sharing & No Lock in period for investments.

STAR Portfolio Performance (as on August 2020)

Duration	STAR Portfolio*	BSE 200
1 Month	2.3%	3.3%
3 Month	12.6%	18.9%
6 Month	3.5%	1.8%
1 Year	8.6%	4.3%
2 Year	6.3%	-4.7%

*returns are calculate system generated

Disclaimer: Returns are based on a client's returns since inception and may be different from those depicted in the risk disclosure document.

TOP 5

Client	Inception Date	STAR Portfolio Returns	BSE 200 Returns
Client 1	16-10-18	42.8%	6.6%
Client 2	24-09-18	33.1%	2.8%
Client 3	25-09-18	29.3%	1.9%
Client 4	08-10-18	34.3%	9.7%
Client 5	09-10-18	34.7%	10.3%

Note : Top 5 outperformer client Vs benchmark

