



Intelligent Advisory Portfolios



New Age of Investment Products vetted by MOFSL framework for Distribution

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SEBI Registered Investment Advisors(RIA).**

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- Pre-packaged equity portfolios offered by Registered Investment Advisors (RIA)
- Range of Product offering to suit all customer profile.
- 100% Automated advice by RIAs & Online Investment process.
- 24X7 portfolio monitoring basis product Rules
- Real time portfolio tracking for clients

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RENOVED RIAs



**NARNOLIA INVESTMENT
ADVISORS PVT LTD.**



**ABAKKUS ASSET
MANAGER LLP**



**RENAISSANCE SMART
TECH PVT. LTD.**



**FINIDEAS
INVESTMENT
ADVISOR PVT LTD.**



**BUOYANT CAPITAL
PVT LTD**



**VIVEKAM FINANCIAL
SERVICES PVT LTD.**

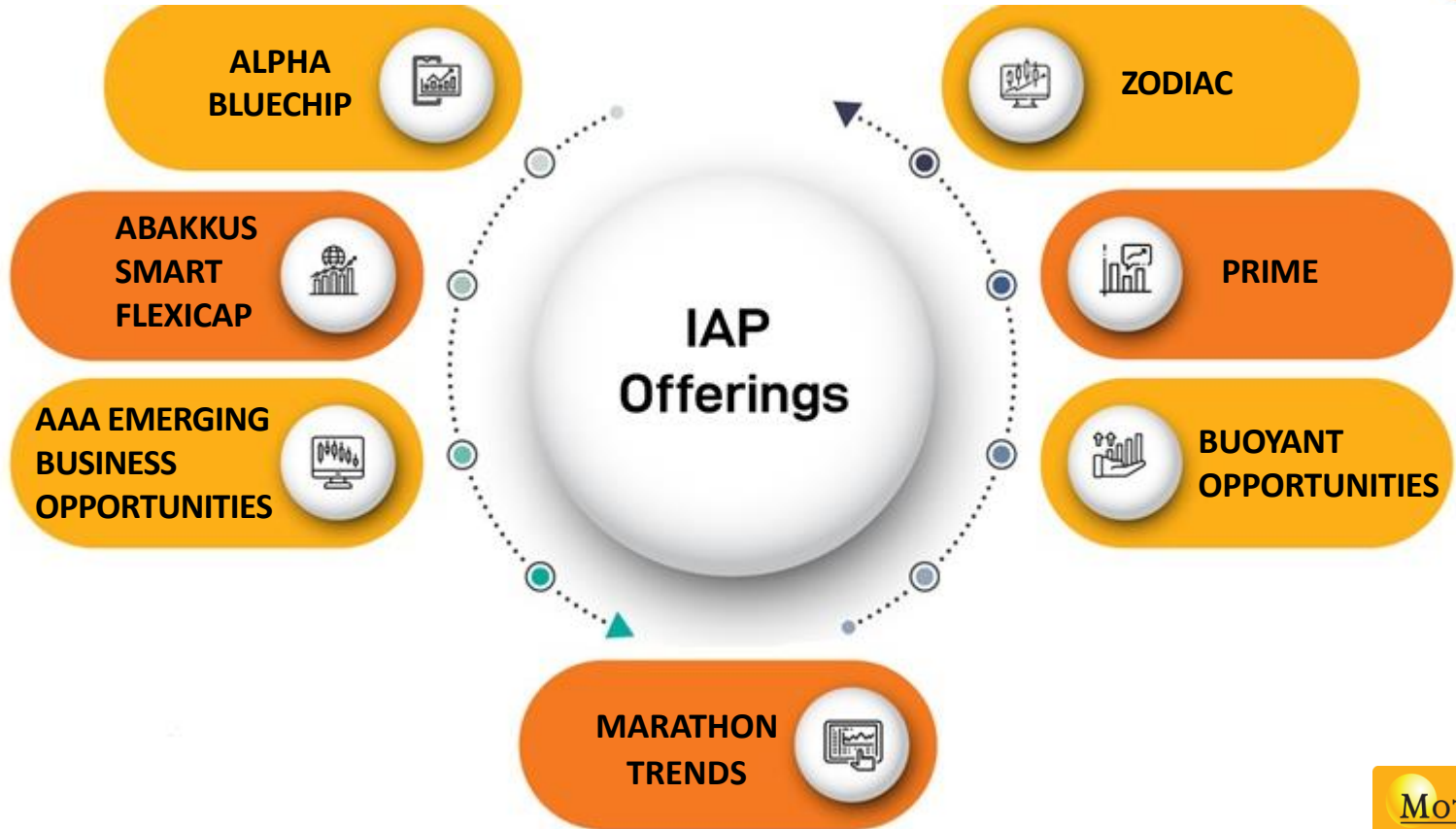


**MARATHON TRENDS
FINANCIAL SERVICES
PVT LTD.**



**ALFACCURATE
ADVISORS PVT LTD.**

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Pankaj is the Director of Renaissance Smart Tech Pvt. Ltd. He has over 25 years of experience in Fund Management and has several accolades to his credit. He was awarded as Best Fund Manager Runner up Award for Axis Midcap Fund by Outlook Money in 2014. The fund(2011-2015) significantly outperformed the benchmark and was a top decile fund for 2012 & 2013. It was ranked the No 1 performing fund in India across all funds in 2014 on 3 year basis.

He was also recognized by Outlook Money as a Leading Fund Manager with 5 years of track record of consistent performance in the year 2015. Pankaj was associated with Axis Mutual Fund as the Chief Investment Officer (CIO) managing over \$2bn in Indian Equities

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FUNDAMENTAL RESEARCH

ALPHA BLUECHIP

AGGRESSIVE



Investment Advisory Service offered by : Renaissance Smart Tech Private Limited:
Registration No : INA000016436
BASL Membership ID.: 1494 CIN: U67200MH2020PTC338091



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Identify “Business Leaders”



1

Companies with Duopoly Markets and Expanding Portfolio



2

Selection of companies with robust growth



3

Leader in Emerging Industry



4

Superior Economic Value



5

Management or Strategy Change

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Alpha Bluechip: Investment Process & Portfolio construct



UNIVERSE

Defined investment universe to include companies with good quality businesses, strong track record and corporate governance



PROCESS

Portfolio Construction based on ideas on bottoms up basis

Zero tolerance to minimize Price/Volatility/Liquidity & Quality risk



STRATEGY: SQGARP

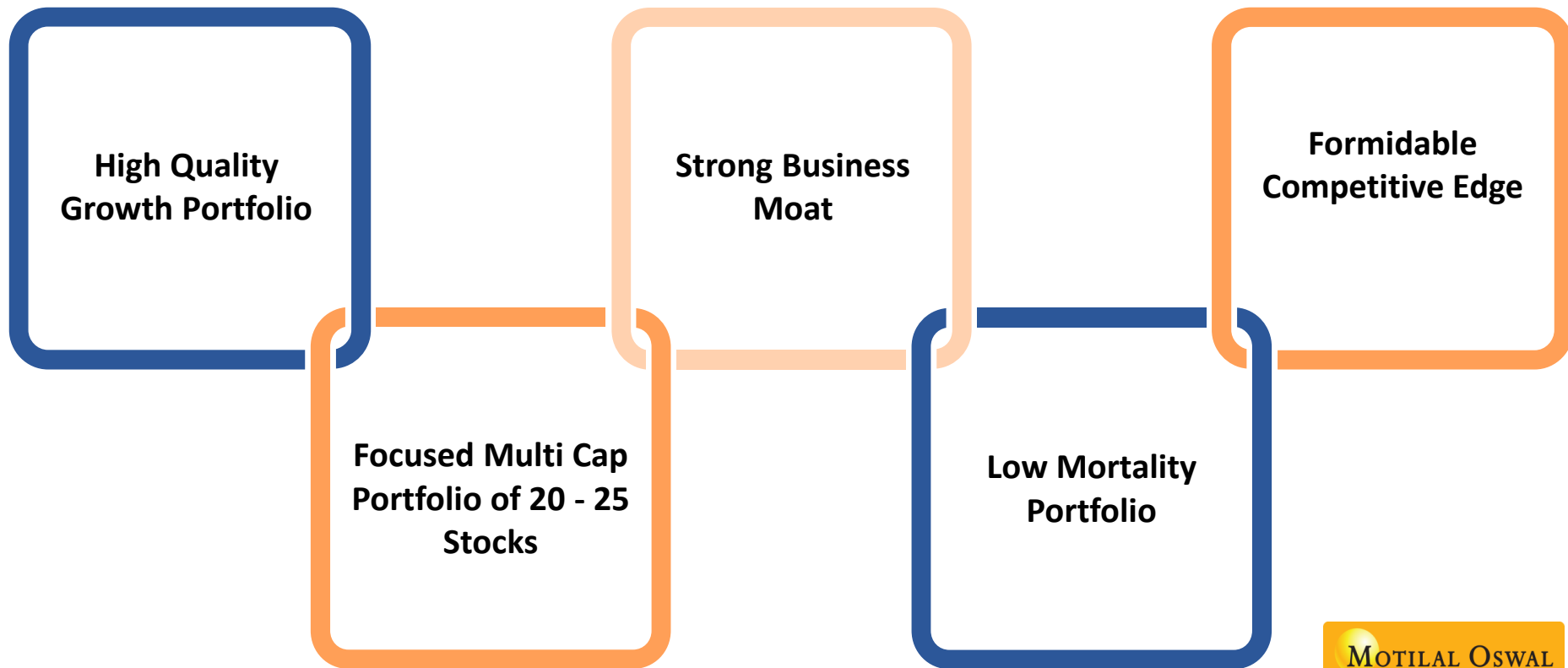
- Sustainable & Quality Growth
- Sustainable Competitive Edge
- Reasonable Price
- Bottom up stock picking

Focused on investing into **Quality** business that can deliver **sustainable** high **growth** over medium term to long term.

Be selective in **cyclical** business

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ALPHA BLUECHIP: REBALANCE CRITERIA



- Long term growth becomes questionable
- Overexposure in a particular company/sector
- Structural change in the business model of the company
- Change in outlook on some sector/stocks

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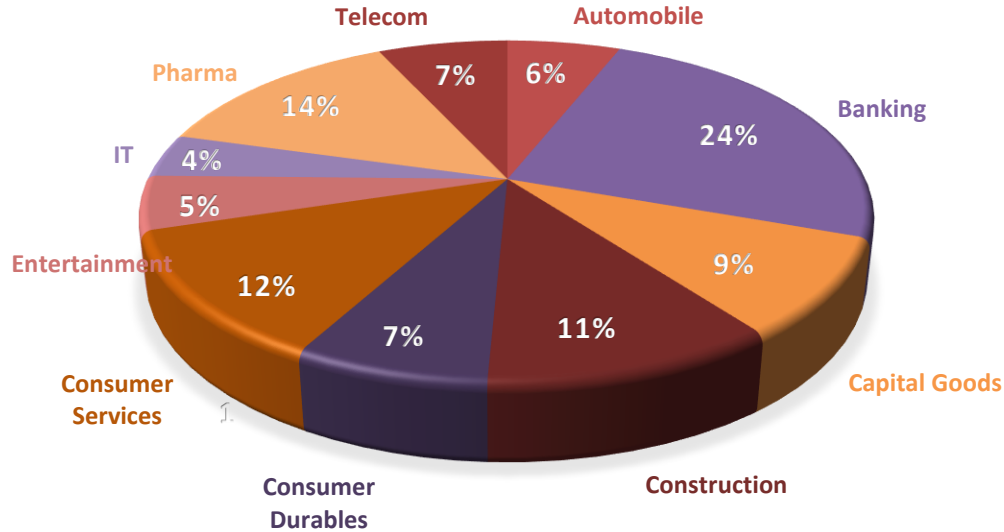
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Alpha Bluechip: Illustration



SECTOR DISTRIBUTION



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- Former CIO Equities of Reliance Nippon Life Asset Management (now Nippon Life India Asset Management) overseeing ~USD 11 billion of equity assets
- First Indian to be appointed on the Global Board of CFA institute, USA (2013-2019)



- Ex-Honorary Chairman of Investment Committee of CFA Institute (2018-2019)
- Currently appointed on the IFRS Capital Markets Advisory Committee (CMAC) and the only member from India to be appointed for the same (2020-2023)
- Rated as among the best fund managers (Rated best Fund Manager by Outlook Business in 2016 & 2017 over 10-year time frame)
- CA & CFA Charter Holder

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FUNDAMENTAL RESEARCH

ABAKKUS FLEXI CAP

AGGRESSIVE

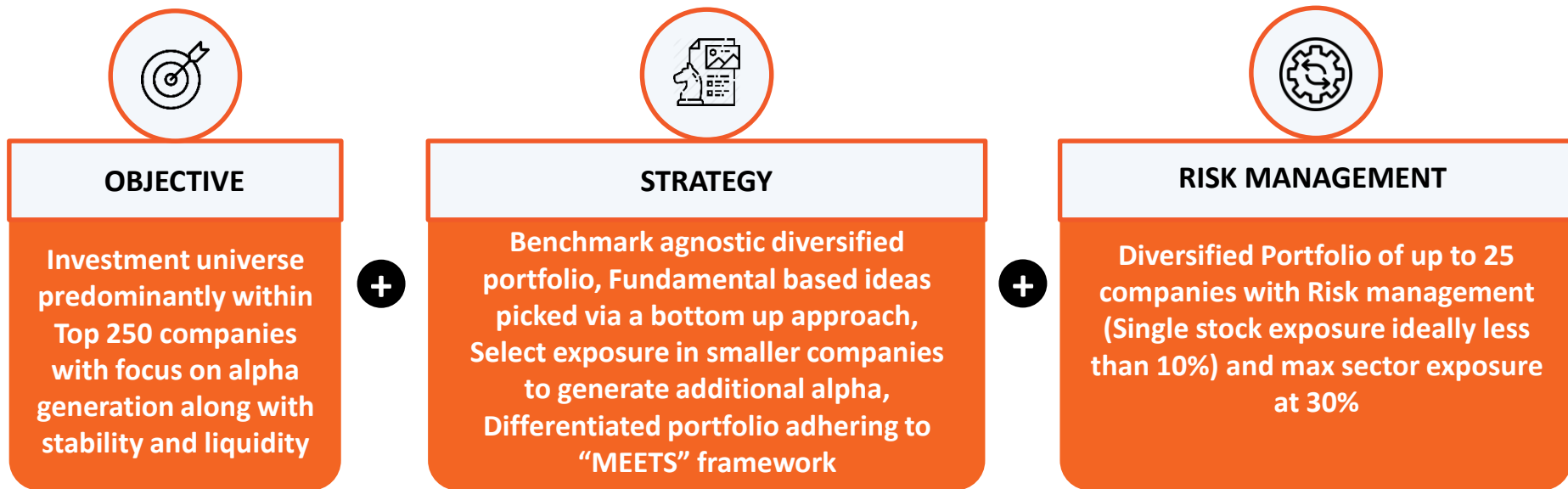


Investment Advisory Service offered by: Abakkus Investment Advisors (a division of Abakkus Asset Manager LLP) providing Investment Advisory Services under the brand Abakkus Smart:
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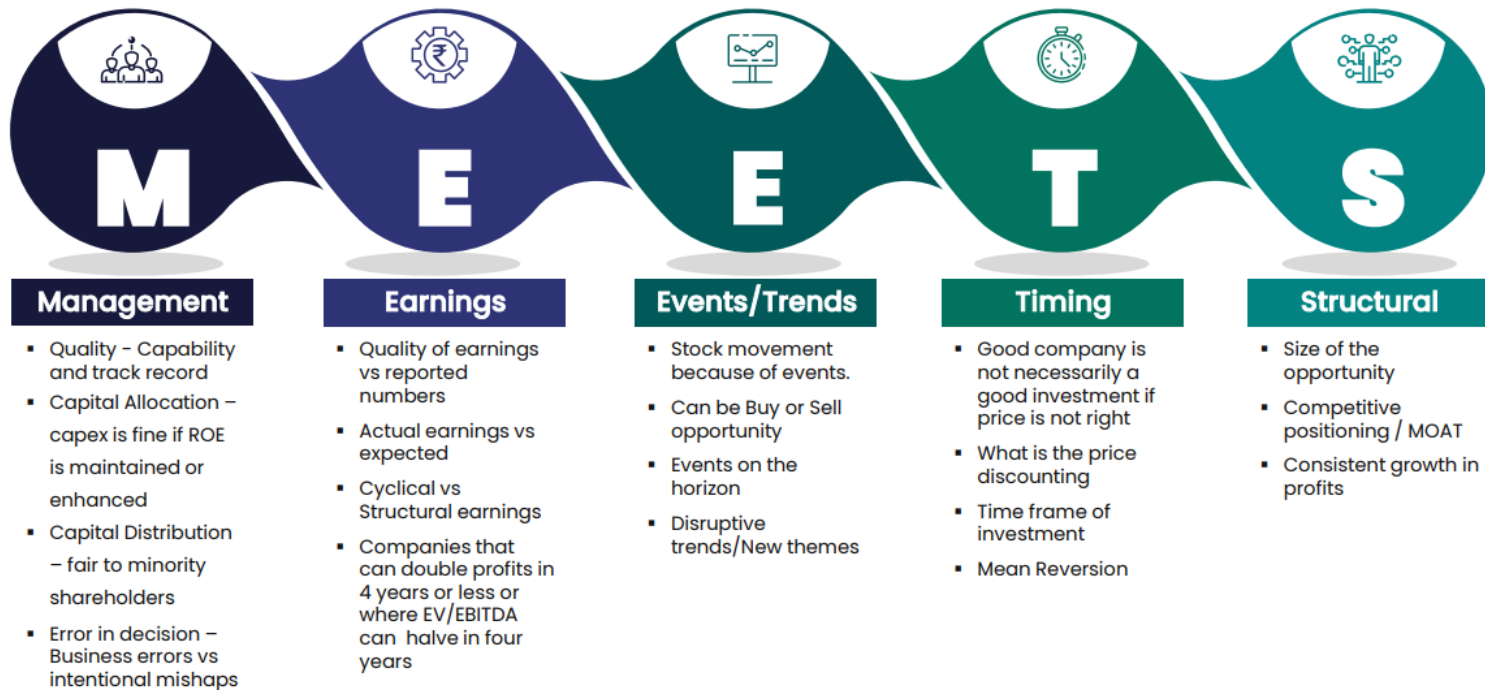


Abakkus Smart Flexi Cap : Core Strategy & Risk Management



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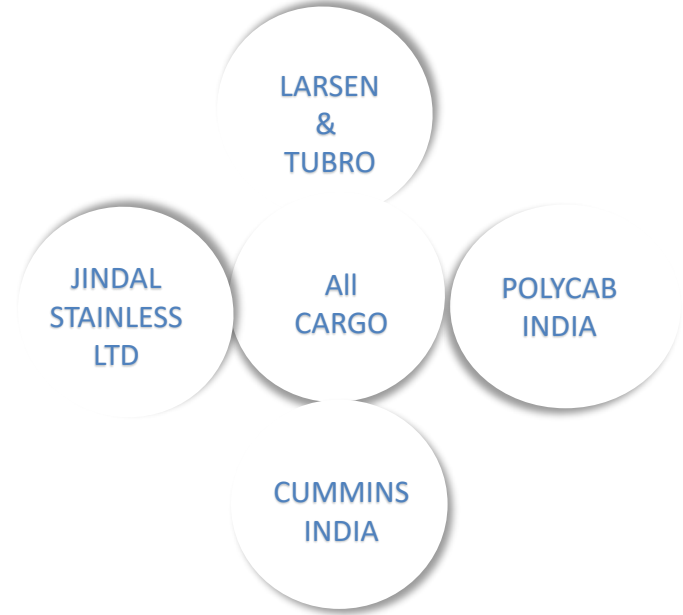
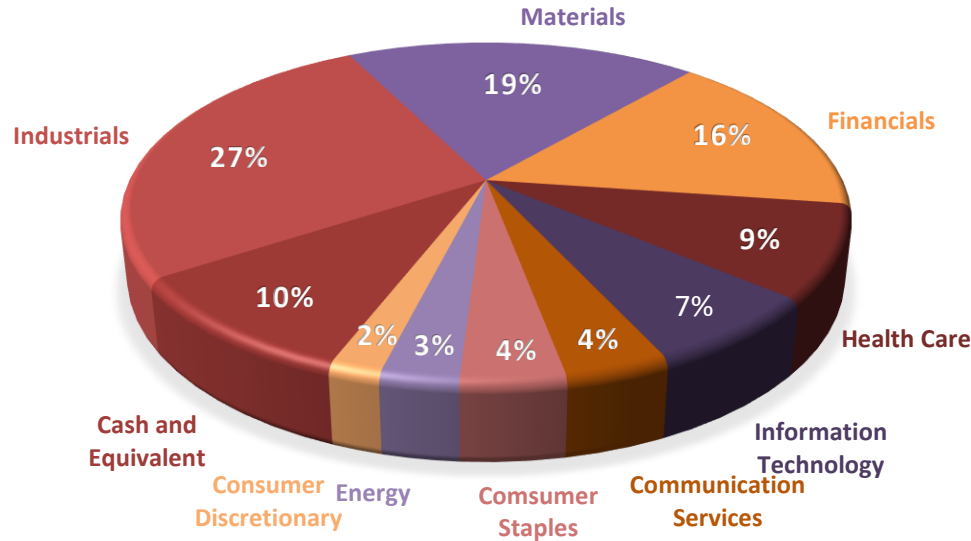
Abakkus Smart Flexi Cap : MEETS FRAMEWORK



Abakus Smart Flexi Cap : Illustration



SECTOR DISTRIBUTION



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Dipen Sheth
- Director

Buoyant Capital is a SEBI registered alternatives asset manager. Founded in 2016, it has a long track record of delivering consistent and superior risk-adjusted returns.

It has a single strategy PMS offering and has delivered significant alpha over benchmark indices.

The Buoyant Opportunities PMS has consistently won five stars in the Crisil-PMS Bazaar rating system.

Dipen is the Director of Buoyant Capital Pvt. Ltd and Principal Officer of Buoyant Capital's Investment Advisory Division. He has over 32 years of diverse professional and entrepreneurial experience. He is an alumnus of IIT-K and IIM-C. Prior to joining Buoyant, he headed Research at HDFC.

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FUNDAMENTAL RESEARCH

BUOYANT OPPORTUNITIES

AGGRESSIVE

buoyant

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IAP

Intelligent Advisory Portfolios

Buoyant Opportunities : Core Strategy & Risk Management



OBJECTIVE

Cross-cycle, flexi-cap, reasonably concentrated portfolio (12-18 stocks) of Indian stocks that seeks to generate Index-beating returns over the medium to long term



STRATEGY

Identify opportunity based on market cap, sectors or theme and then, drill down to specific stocks that fulfil quality, cash flow and growth filters



RISK MANAGEMENT

Flexi cap portfolio construction across small/mid/large caps to balance risk vs. reward at different points of time in the cycle

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Portfolio Construction: Core & Satellite Vertical



Core vertical



Cash flows

Prefer predictable versus optional



Reinvestment

Prefer dividend yield versus growth



Leadership

Prefer industry leaders versus challengers

Satellite vertical



Cyclicals

Metals, Commercial Vehicles, NBFC



Turnaround

Disruption ending: Bharti Airtel



Value

Leader hugely expensive: Max Financial

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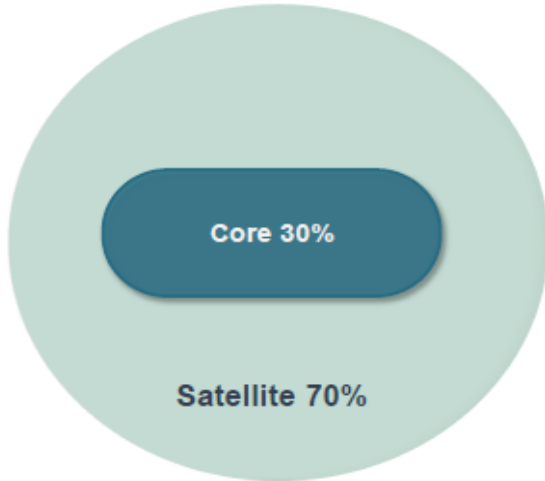
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Understanding Cycles: Aggressive & Defensive Cycles

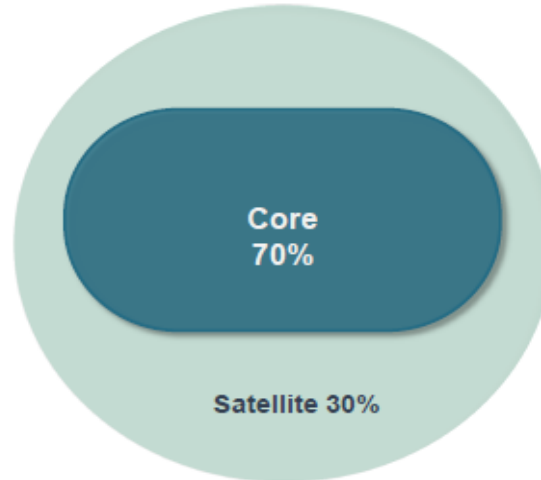


Aggressive cycle stance



- **The end-game**
 - Generate superior returns
- **Execution**
 - Satellite allocation > Core allocation

Defensive cycle stance



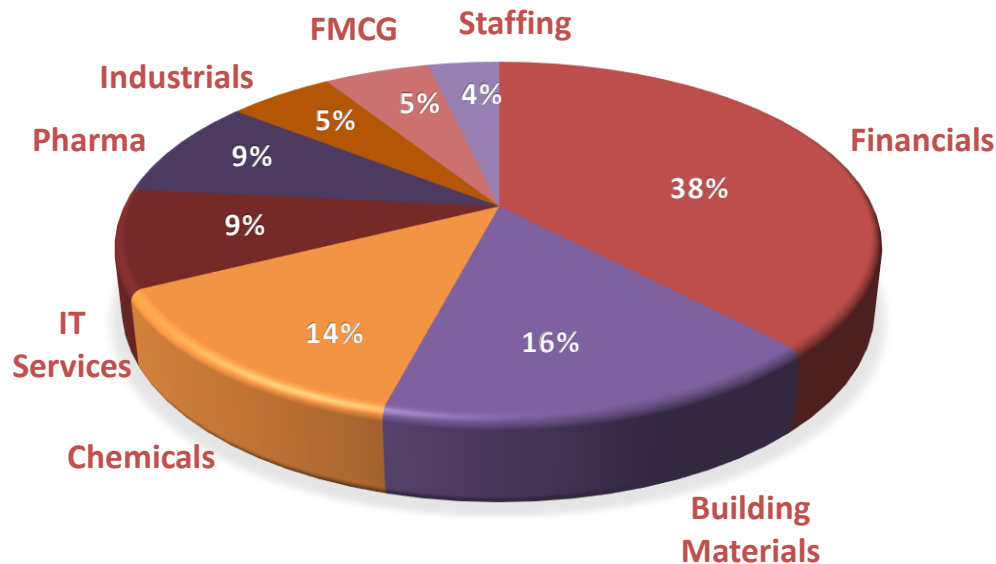
- **The end-game**
 - Protect capital
- **Execution**
 - Core allocation > Satellite allocation

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Buoyant Opportunities : Illustration

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About The Founder



Atul Suri



1991-Parag Parikh
Fundamental Analyst



1994-Masters in Finance
Sydney, Australia



1997-Birla Sun Life
Technical Analysis



2007-Rakesh
Jhunjunwala
Advisory & Fund
Management



2023-Marathon Trends
Fund Management

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FUNDAMENTAL + TECHNICAL RESEARCH

TREND INVESTING

AGGRESSIVE

**MARATHON
TRENDS**

Investment Advisory Service offered by : Marathon Trends Advisory Pvt Ltd.
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IAP

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Trend Investing : Combination of Fundamental and Technical Approach



Selection from the top 300 Quality liquid stocks across Large, Mid, and small-cap segments.



Fundamental analysis is done to pinpoint high-quality stocks



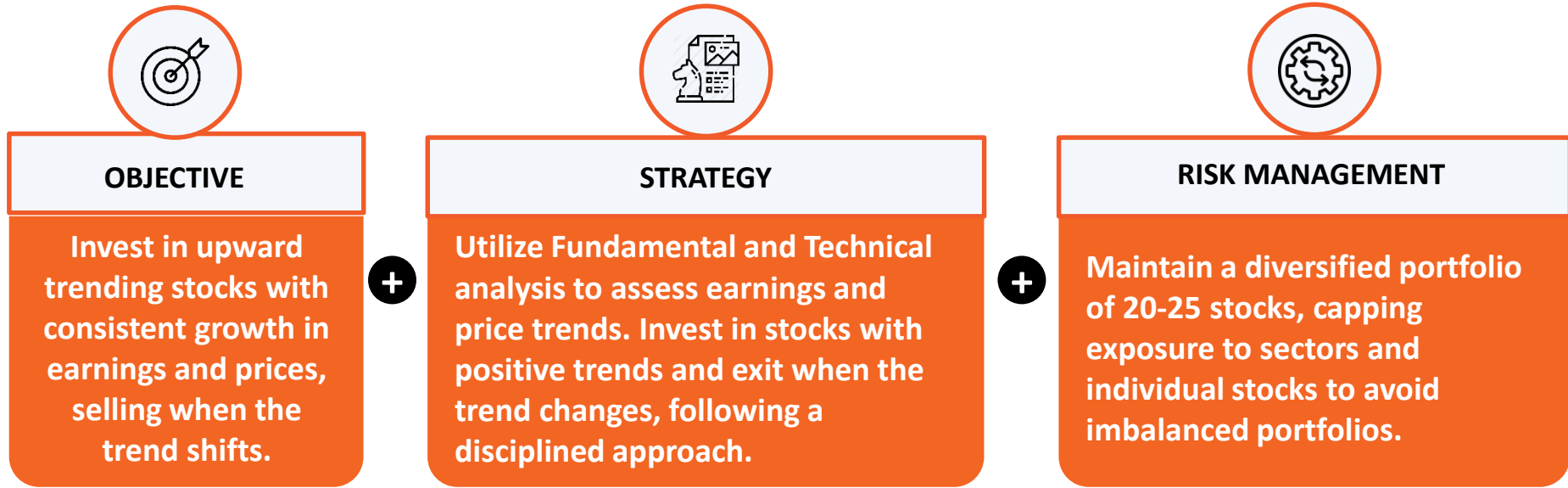
Filtering through Technical analysis, resulting in 20-25 stocks exhibiting favorable & consistent price momentum.



Follows principle of "cutting losses and letting profits run,"

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Trend Investing : Core Strategy & Risk Management



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REBALANCE CRITERIA

- Strategy exit positions upon observing a reversal in both earnings and price trends.
- It focuses on replacing underperforming stocks in the portfolio with emerging trends, maintaining an optimal balance between minimizing churn and ensuring a trending portfolio.
- This process is carefully timed to strike the right balance for portfolio adjustments.



Rajesh Kothari
- Founder & Managing
Director

Mr. Rajesh Kothari is the visionary Founder & Managing Director of AlfAccurate Advisors & the driving force behind making AAA one of India's most respected, award-winning investment management firms.

He has 27+ years of rich experience in the Indian capital market with deep expertise in Long Only & Long Short investment strategy.

He has conceptualized & executed AAA's unique Radically Resilient investment ethos and 3M investment philosophy towards consistent superior risk-adjusted returns over the past 14 years.

- AlfAccurate Advisors received Business Award for the Best PMS Provider in India from APAC-Insider 2021.
- AAAIOP PMS also received the award for Best 10 Years performance across categories (rank 3) by PMS-AIF World 2024.

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FUNDAMENTAL

AAA EMERGING BUSINESS OPPORTUNITIES

AGGRESSIVE

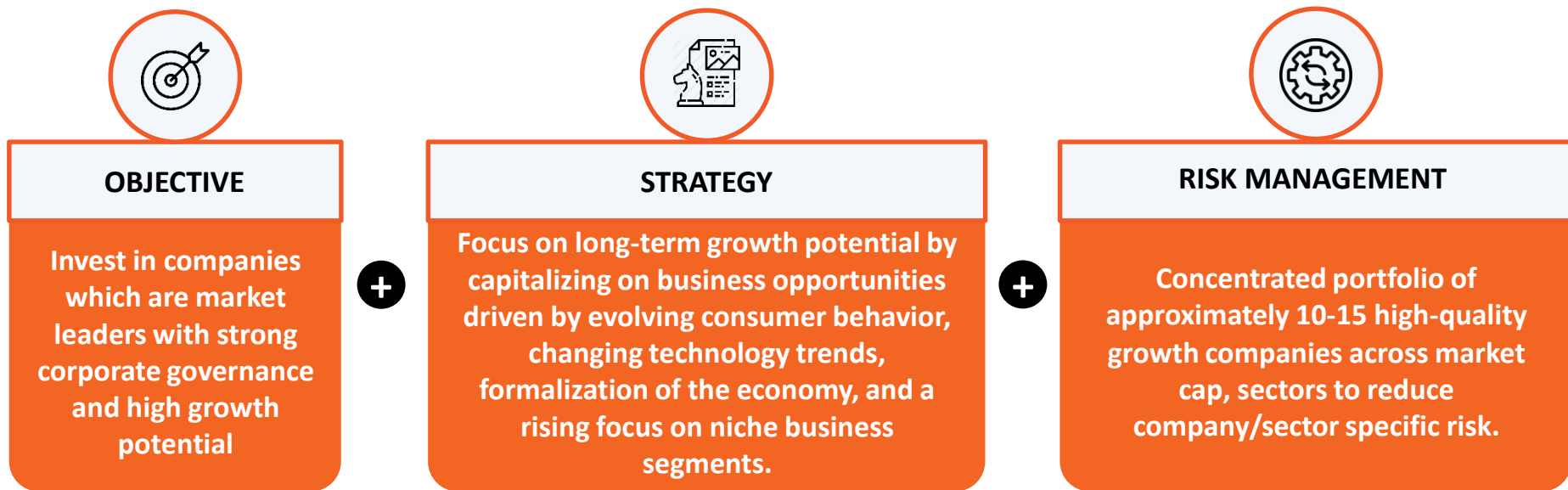


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**Market
Size**

Preferring companies which are targeting large market size to generate exponential returns.

Buying companies which are leaders in their sector as they are best positioned to navigate upturn and downturn of the economy

**Market
Share**

**Margin
Of
Safety**

Following the moto of “Price is what you pay. Value is what you get”. Investing in companies which are available at reasonable valuations.

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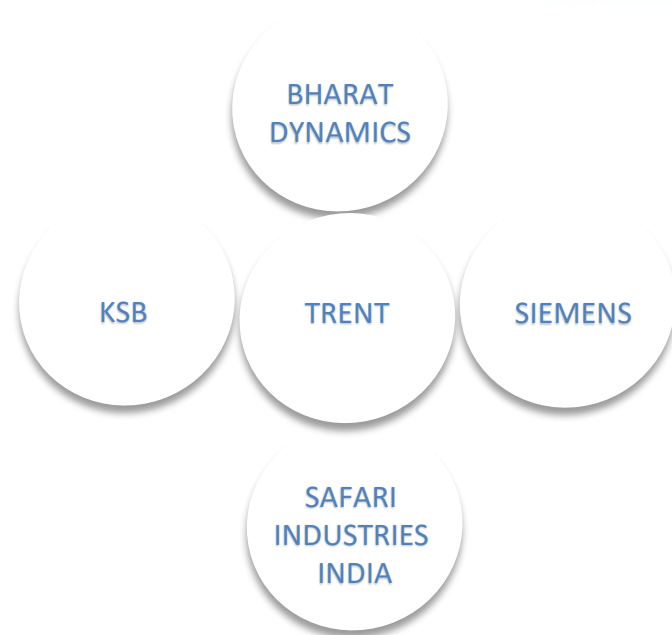
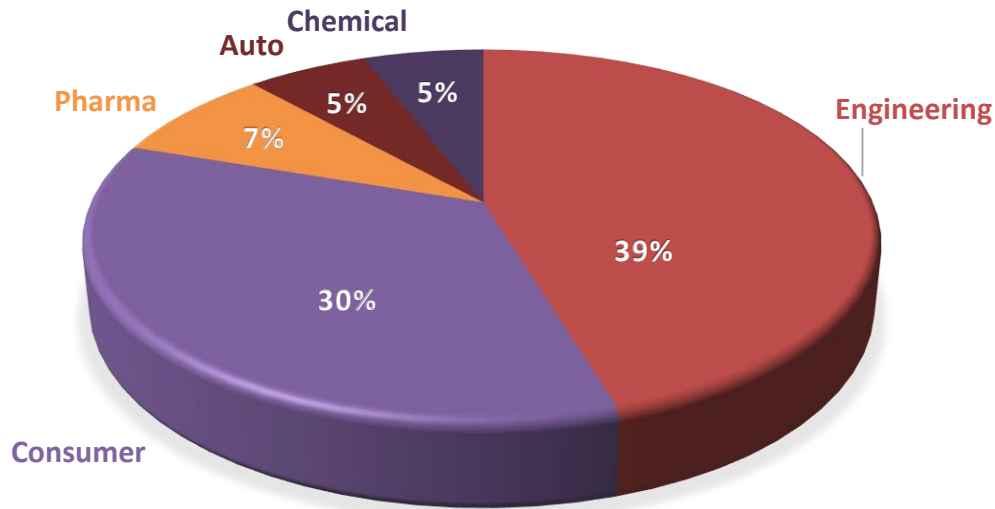
REBALANCE CRITERIA



- When there is a need to rebalancing weights for risk management purposes
- When a company no longer meets our buy/hold criteria
- When there is a more compelling investment opportunity to fund

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SECTOR DISTRIBUTION



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- India's Oldest Investment Advisory Product Manufacturer with a track record of 18 yrs. of Research & 12 yrs. of Real-Time Performance.
- Under the leadership of Mr. Shailendra Kumar, Narnolia has been recognized as the '2nd Largest RIA of the Country
- Industry Leading Performance: 4 Star Rating, Rank 2 by CRISIL for 2020-21 & Best PMS on 5 year Performance across all Categories: Rank 2 from IIM - Ahmedabad.



Shailendra Kumar
Co-Founder & CIO



NS Mid & Small cap

AGGRESSIVE

NS 500T

AGGRESSIVE

NS Industry Champ

CONSERVATIVE

NS Ethical

AGGRESSIVE

Bottom up stock research with M5 Framework

Narnolia

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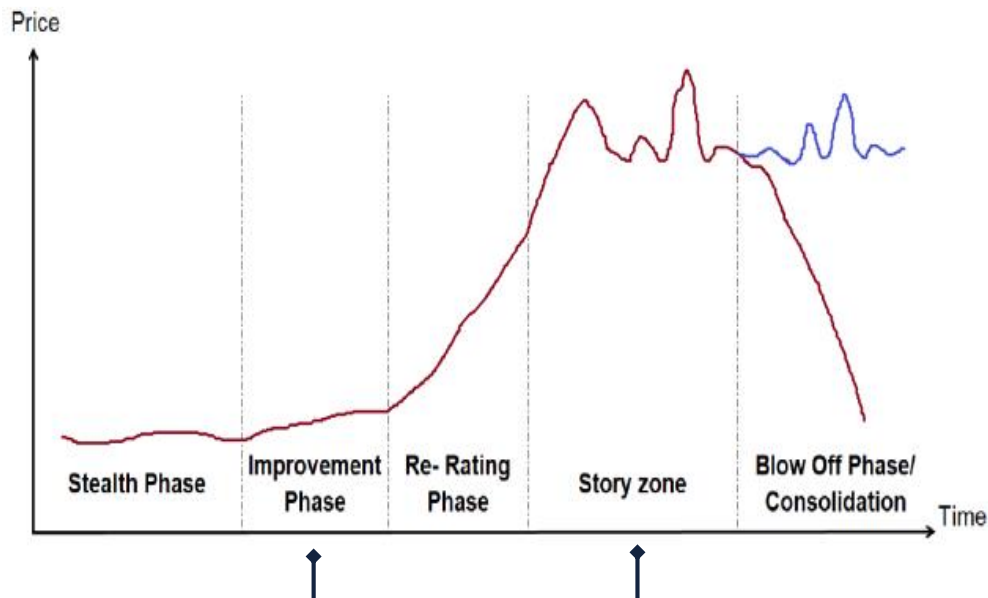
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IAP

Intelligent Advisory Portfolios

Good Business : Growth in value & principle of Linearity



- ❖ Mid Improvement Phase to Mid Story Zone phase favors 'Growth In Value' Style of Investing.
- ❖ 2021 to 2024 should favor this style similar to 2014 -2016.

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4 Pillars of Risk Management framework



01

STOCK LIMIT

Limits on Maximum weightage on single stock

02

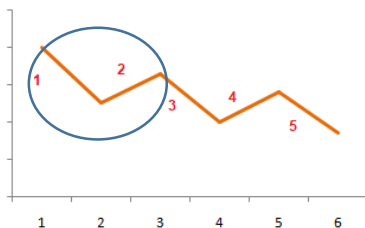
SECTOR LIMIT

Limits on Maximum weightage on single sector

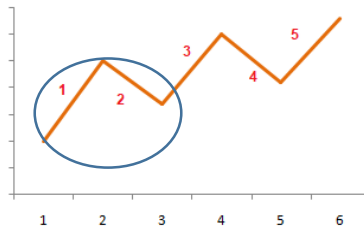
03

STOCK REVIEW

Bear Market



Bull Market

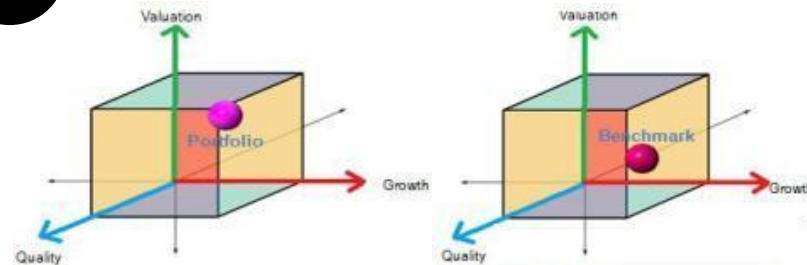


All kinds of market move in alternate swings – Whether Bull, Bear or Sideways

If any of portfolio stocks underperforms for two consecutive swings and exhibits higher volatility, that stock gets market for SELL

04

FUNDAMENTAL QUADRANT – Q G V



Attribute	Quadrant 1	Quadrant 2	Quadrant 3	Quadrant 4
Quality	Low	Average	Good	Very Good
Growth	Poor	Average	Good	Very Good
Valuation	1st Quartile	2nd Quartile	3rd Quartile	4th Quartile

All kinds of market move in alternate swings - whether Bull, Bear or Sideways

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OBJECTIVE

Investing in companies that are top-3 players of their respective industry



STRATEGY

Identify companies which are leaders of their respective industry & are showing Growth in value characteristics with expected higher return ratio



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

Companies with a track record of industry outperformance, effective leadership and efficient management usually find themselves as the industry leaders. In an uncertain economic environment these are the preferred companies to Invest as these companies are run by proven management and leadership team than can navigate difficult times.

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NS Industry champ : Illustration



NS INDUSTRY CHAMP PORTFOLIO		
STOCK	SECTOR	WEIGHT
ICICIBANK	Financials	11%
HDFCBANK	Financials	8%
RELIANCE	Industrial	7%
SBIN	Financial	7%
LT	Industrial	7%
BHARTIARTL	Industrial	7%
TCS	Global	6%
M&M	Consumers	6%
DMART	Consumers	5%
MCDOWELL-N	Consumers	5%

Portfolio Attributes	
No of Stocks	20
% Assets in top 10 holdings	68%
% Assets in Next 5 holdings	21%

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The securities quoted are exemplary and are not recommendatory





OBJECTIVE

Investing in smaller but Budding companies of India



STRATEGY

Active investing in Small Cap investment universe by identifying companies with improving fundamentals. Tactical weight allocation under the sub-classes to achieve positive return along with managing the risk.



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

Most of the multi bagger stock today were small cap few years back. Over the last 2 years, small cap stocks have seen sharp fall owing to credit squeeze, demand slowdown and over ownership during 2017. Small cap theme portfolio is not meant as core portfolio for an investor but some tactical allocation by investors in small cap theme can be highly valuable. Small Cap Companies have potential to perform well in cycles.

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NS MID & SMALLCAP : Illustration



NS Mid and Small Cap Portfolio		
NH	Consumers	7%
ACE	Industrial	6%
IDFCFIRSTB	Financials	6%
CAMS	Financials	5%
CANBK	Financials	5%
TVSMOTOR	Consumers	5%
RATEGAIN	Consumers	5%
KAYNES	Industrial	4%
VSTILLERS	Consumers	4%
EQUITASBNK	Financial	4%

PORTFOLIO ATTRIBUTES	
No of Stocks	25
% Assets in top 10 holdings	50%
% Assets in Next 5 holdings	19%

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OBJECTIVE

The portfolio provides a unique theme-based investing opportunity in the Indian market



STRATEGY

This strategy focuses on themes that should form part of India's next growth engine. The portfolio comprises stocks from 5(4-6) different themes.



PROCESS : Fundamental Bottom - Up Research

Information mining, financial modeling, investment thesis, active & rigorous tracking for changes in earnings & quality outlook.

As India approaches to become \$5trillion economy by GDP, the total Market Cap of Indian companies will also set to increase by 11-12% CAGR. Some of the market cap gains will come from new listings but a large part of the gains will come from select themes

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NS 5Tx5T Portfolio		
STOCK	Themes	WEIGHT
SBIN	Financials	10%
HDFCBANK	Financials	8%
NH	Consumers	6%
ICICIBANK	Financials	6%
DMART	Consumers	6%
L&TFH	Financials	6%
LT	Industrials	6%
ACE	Industrial	5%
CUMMINSIND	Industrials	5%
UNOMINDA	Consumers	5%

PORTFOLIO ATTRIBUTES	
No of Stocks	19
% Assets in top 10 holdings	65%
% Assets in Next 5 holdings	22%

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OBJECTIVE

Invest in companies of high quality with growth in near and long term



STRATEGY

Refrains from investing in those companies which may be against moral, social, religious or environmental beliefs of investors.



PROCESS : Fundamental Bottom - Up Research

Rigorous research on 5Ms process visualizing - Market, Management, Moat, Financial Model and Multiples

A unique theme-based portfolio, invests in companies that are part of S&P BSE 500 Shariah Index constituting of companies that conducts business in socio-responsible ways.

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NS Ethical S1 : Illustration



NS ETHICAL S1 PORTFOLIO		
STOCK	SECTOR	WEIGHT
CUMMINSIND	Industrials	9%
ABBINDIA	Industrial	7%
TITAN	Consumers	7%
RATNAMANI	Industrial	7%
TCS	IT	6%
NH	Consumers	6%
ASTRAL	Industrial	5%
SUNPHARMA	Health Care	5%
LUPIN	Health Care	5%
PETRONET	Industrial	5%

Portfolio Attributes	
No of Stocks	20
% Assets in top 10 holdings	68%
% Assets in Next 5 holdings	21%

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- Vivekam Financial Services Pvt Ltd was set up in 2010 offers investment advisory products for every type of investor.
- Serving 36,000+ clients directly and through collaborations with brokerages
- Vivekam products are strictly rule based and logic is driven by these triggers. Discipline is key in investments.



Tested & trusted by 36,000 + Clients,



VVK Prasad
Chairman & Managing Director

FUNDAMENTALS SCREENING COMBINED WITH QUANT MODEL

ZODIAC

MODERATE



Investment Advisory Service offered by : Vivekam Financial Services Pvt Ltd.
Registration no: INA200000316



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Zodiac : Combination of Strong fundamental screening aided by Quant Model



Research
Fundamental
Screening Model



Sector Preference
Sectors which can do
well or underperform



Financial Analysis
Growth In EPS, ROE &
other Parameters



Quantitative Trend
ETP, Momentum &
Volatility parameters

Core Fundamental screening combined with Quant Model for Decision making to avoid Human Bias

Zodiac : Core Strategy & Risk Management





Each Portfolio is actively monitored & rebalanced



When Potential
upside in stock is
achieved



If Stock is excluded
from Nifty Index



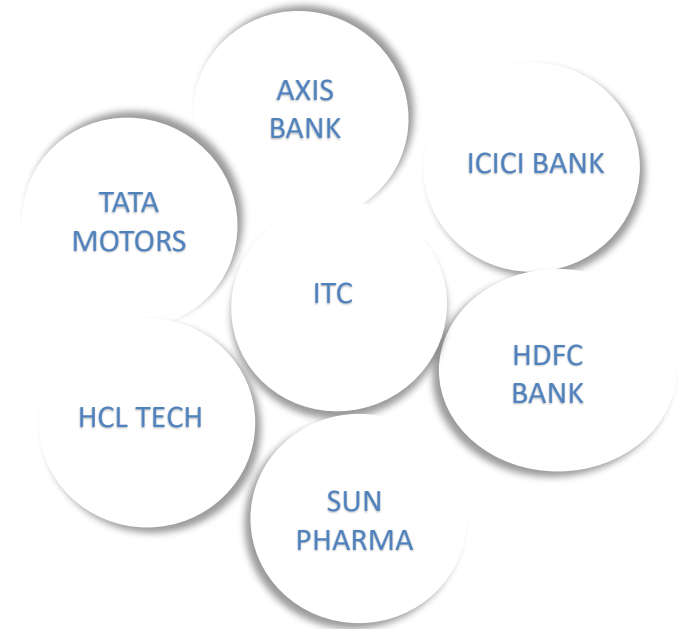
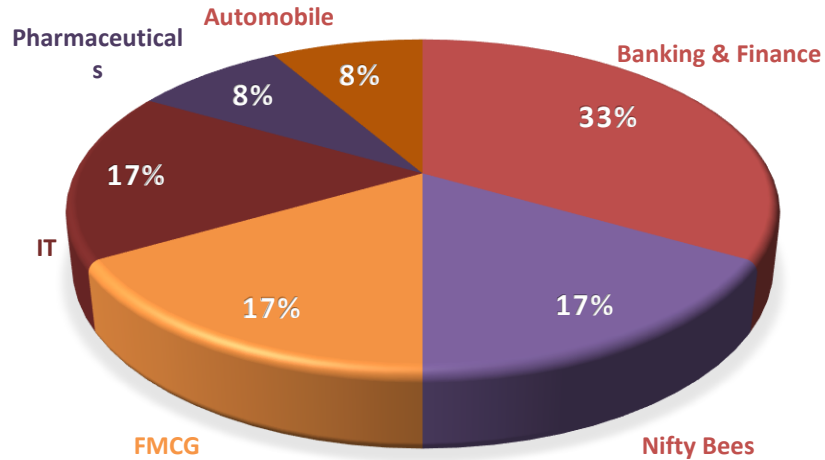
Nifty Bees will be
switched when a new
Stock opportunity with
potential is identified



Stock Price corrects
by more than RIAs
tolerance levels

30D1AC: Illustration

SECTOR DISTRIBUTION



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FUNDAMENTAL RESEARCH

PRIME

MODERATE



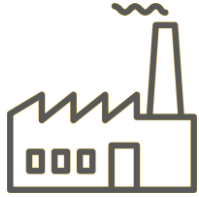
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Intelligent Advisory Portfolios



Track data across 30 different sectors/sub-sectors



Quantitative screeners across various accounting, growth, valuation & return ratio parameters



Detailed balance sheet, Income-statement, Cash flow statement & Con-call analysis



Real time news, trackers of companies, earnings and other market participants

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Long Term compounders

Stocks which have a proven track record of profits over 3-5 years, meaningful growth triggers & beaten down stocks with favorable risk reward



Tactical Picks

Stocks which can become relevant based on any triggers including a change in government policy, industry consolidation and company specific opportunities

Time Horizon: 12-18 months

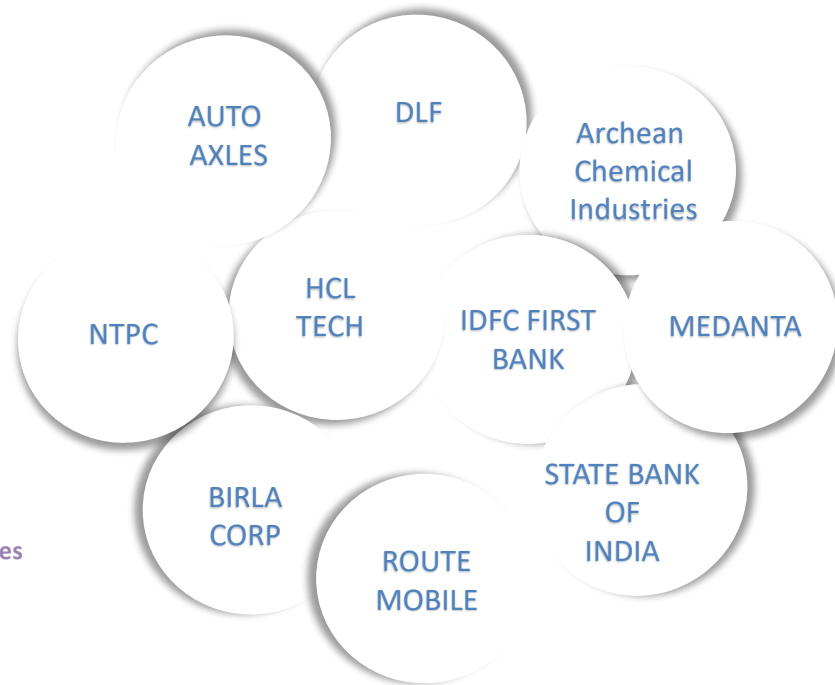
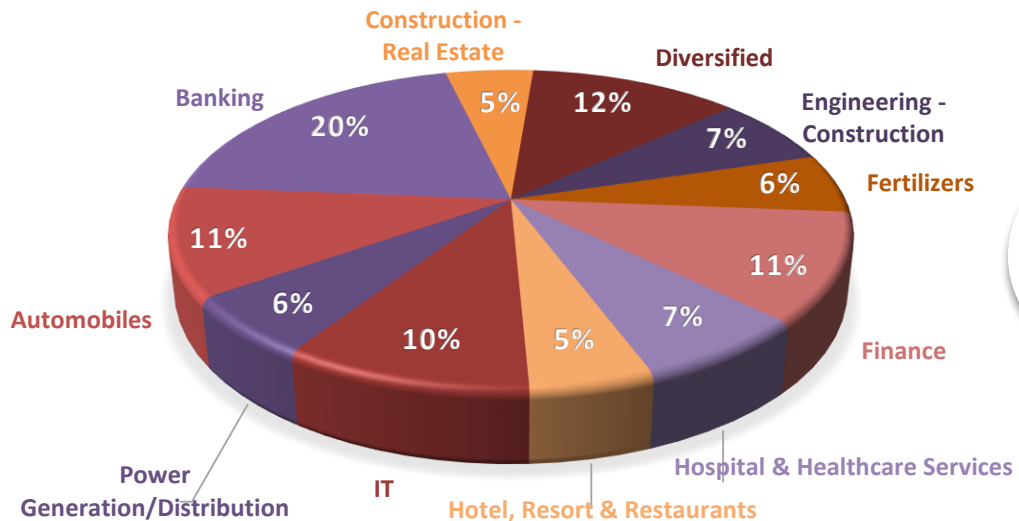
Time Horizon: 3-6 months

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- Investment thesis is no longer valid due to
 - Entry of a large competitor into the sector
 - Change in company's capital allocation policy
 - Entry into an unrelated industry
 - Major management overhaul
- Substantially better risk/reward opportunity based on growth prospects , capital allocation policies or any alternate sector with tailwinds
- When the initial hypothesis, with which RIA had bought the stock, has run its due course
- Fall in stock price since included (with RIA Overlay).

SECTOR DISTRIBUTION



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FUNDAMENTAL RESEARCH

MF PORTFOLIO

MODERATE



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Intelligent Advisory Portfolios

A smart multicap portfolio of multiple mutual funds to help investors generate index beating returns

Ranks all mutual funds through rolling performance data and only suggests 2-3 top schemes based on its rankings

Constant monitoring of the portfolio and timely rebalance once a month if needed.

To ensure a low churn and thereby lower capital gains tax incidence, schemes will be replaced only if they fall below 10 ranks

Only schemes with atleast 500 Cr AUM considered to ensure adequate volume

Any scheme in portfolio that falls below top 10 ranks, gets replaced by the top most ranked scheme

Collective performance of the fund folio is measured across time frames

Monthly review to ensure Top Funds stay in the portfolio

Timely Rebalancing to gain maximum benefits

Selected diversified schemes without sector specifications with AUM above 500 Cr

Products Summary



PRODUCT	ABAKKUS SMART FLEXICAP	BUOYANT OPPORTUNITIES	PRIME	ZODIAC	ALPHA BLUECHIP	Trend Investing	AAA EMERGING BUSINESS OPPORTUNITIES
MIN INVESTMENT	5,000,00	2,50,000	1,00,000	2,50,000	2,50,000	2,50,000	2,50,000
TOP UP (Rs)	80,000	100000	50,000	1,00,000	1,00,000	1,00,000	1,00,000
SIP OPTION	NO	NO	NO	NO	NO	NO	NO
RISK CATEGORY	Aggressive		Moderate		Aggressive		
BENCHMARK	Benchmark Agnostic	BSE 500 TRI	NIFTY 200	NIFTY 50	NIFTY 200	BSE 500	S&P BSE MidSmallCap TR
INVESTMENT UNIVERSE	MULTICAP	MULTICAP	MULTICAP	LARGECAP	MULTICAP	MULTICAP	MID & SMALLCAP
STOCK SELECTION METHODOLOGY	FUNDAMENTAL			FUNDAMENTAL & QUANTITATIVE	FUNDAMENTAL	FUNDATMENTAL & TECHNICAL	FUNDAMENTAL
RIA	ABAKKUS ASSET MANAGER LLP	BUOYANT CAPITAL PVT LTD	VIVEKAM FINANCIAL SERVICES PVT LTD.		RENAISSANCE SMART TECH PRIVATE LIMITED	MARATHON TRENDS LIMITED	ALFACCURATE ADVISORS
SUBSCRIPTION MODE	2.5% p.a (Half yearly at 1.25% for 6 months on daily average AUA)	2% p.a (Half yearly at 1% for 6 months on daily average AUA)	2% P.A. (CHARGEABLE HALF YEARLY at 1% ON AUA)		2% P.A. (CHARGEABLE HALF YEARLY at 1% ON Daily average AUA)		2% p.a (Half yearly at 1% for 6 months on daily average AUA)

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Products : Narnolia (Summary)



PRODUCT	NS 5Tx5T	NS MID & SMALL CAP	NS INDUSTRY CHAMPS	NS Ethical S1
MIN INVESTMENT	5,00,000	2,50,000	2,50,000	2,50,000
TOP UP (Rs)	100000	50,000	50,000	1,00,000
SIP OPTION	25,000	25,000	25,000	25,000
RISK CATEGORY	Aggressive		Conservative	Aggressive
BENCHMARK	NIFTY 500	NIFTY SMALLCAP 400	NIFTY LARGE MID 250	S&P BSE 500 SHARIAH INDEX
INVESTMENT UNIVERSE	MULTICAP	MID & SMALL CAP	MULTICAP	MULTICAP
STOCK SELECTION METHODOLGY	FUNDAMENTAL			
RIA	NARNOLIA INVESTMENT ADVISORS PVT LTD.			
SUBSCRIPTION MODE	2% p.a (Half yearly at 1% for 6 months on daily average AUA)			

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Investment Mode offered by RIAs



LUMP SUM

Option : One Time Investment
Min Amount : 1 lakh – 5 lakhs (Product chosen)
Top Up : Min Rs. 50000 & in multiples of Rs. 1000
Subscription mode : Upfront Subscription

SIP

Option : Systematic investment on Dates (1,8,18,22)
Min Amount : Rs.25000 (Not Available for few products)
Top Up : Investment will be done in LUMP SUM MODE
Subscription mode : Upfront Subscription

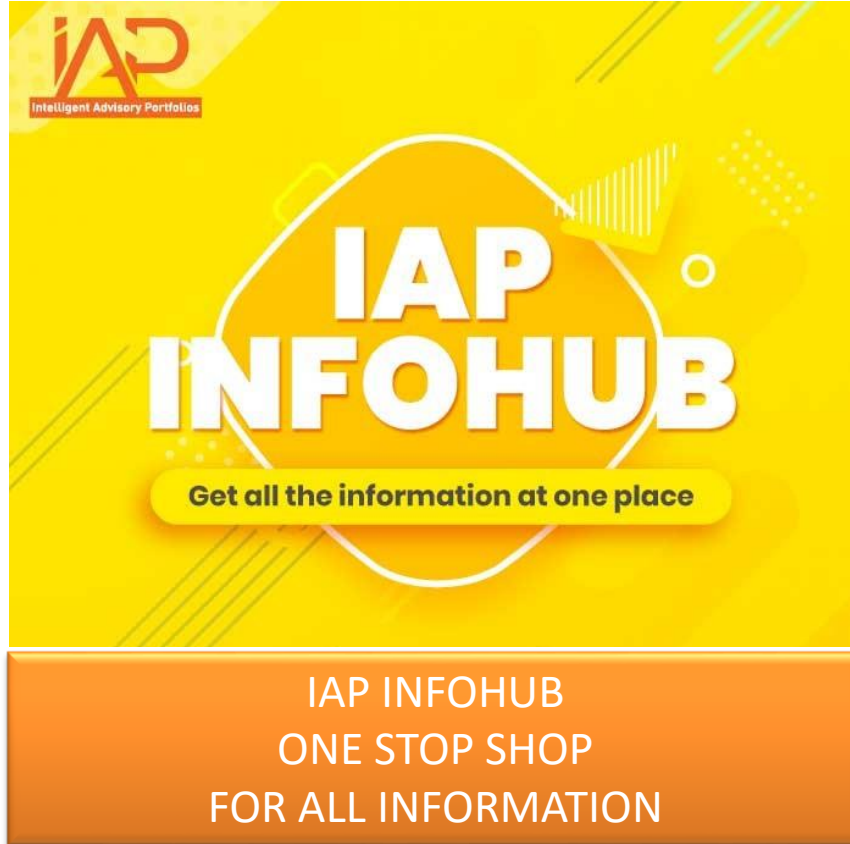
Upfront Subscription

Fees	: 2% p.a (Chargeable Half yearly on AuA at 1%)
Fees Abakkus	: 2.5% p.a (Chargeable Half yearly at 1.25% for 6 months on daily average AUA)
Brokerage*	: 0.50%
Breakage Fees	: NIL
Withdrawal	: Full & Partial

*Charged by MOFSL

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The graphic features a yellow background with abstract geometric shapes like triangles and circles. In the top left corner, there is a small IAP logo with the text 'Intelligent Advisory Portfolios' below it. The main text 'IAP INFOHUB' is written in large, bold, white capital letters, centered within a white-outlined circle. Below this, a yellow pill-shaped button contains the text 'Get all the information at one place' in black. At the bottom of the graphic is a solid orange rectangular box with the text 'IAP INFOHUB ONE STOP SHOP FOR ALL INFORMATION' in white capital letters.

IAP
Intelligent Advisory Portfolios

**IAP
INFOHUB**

Get all the information at one place

**IAP INFOHUB
ONE STOP SHOP
FOR ALL INFORMATION**

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Thank you



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