



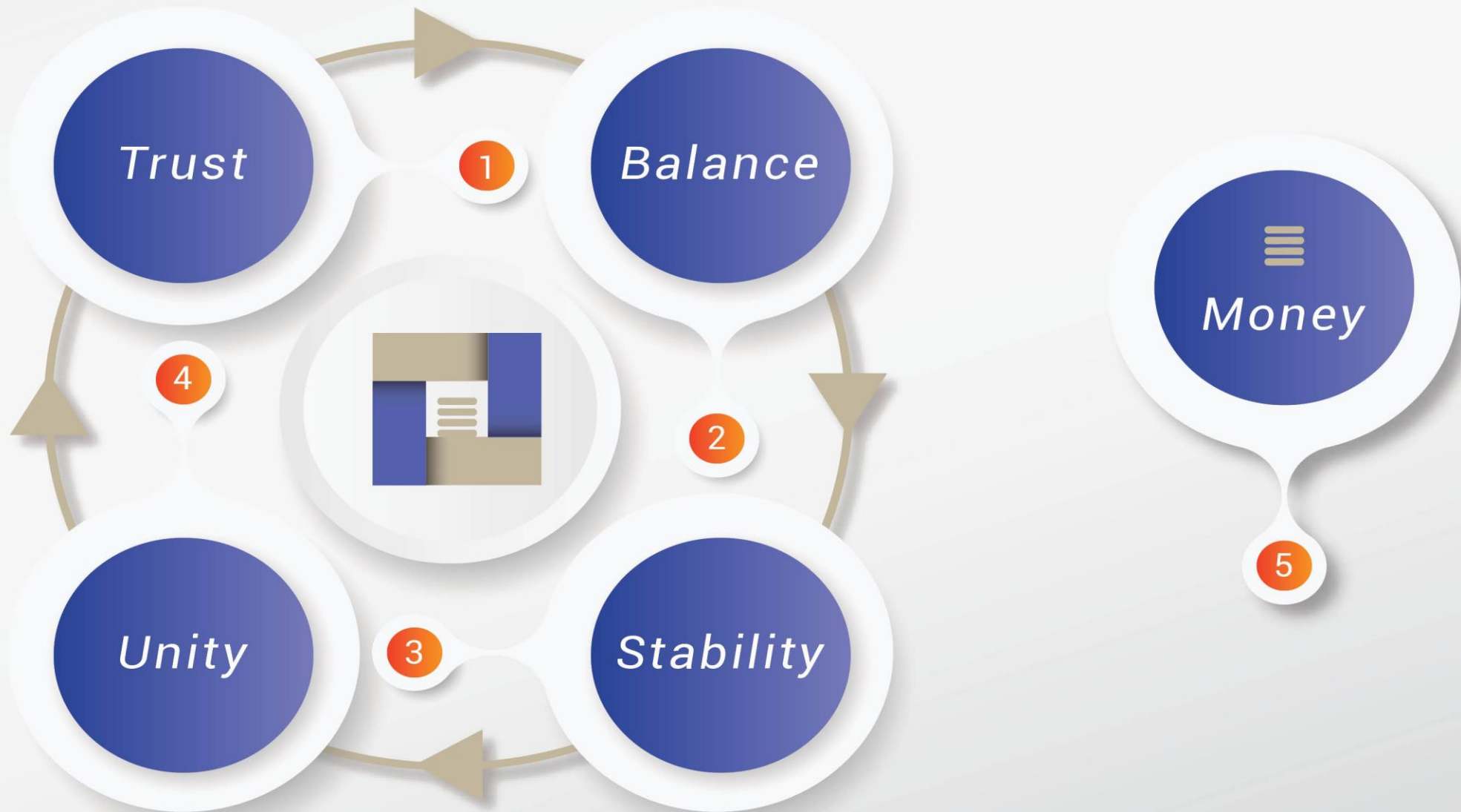
# AIF & PMS

EXPERTS INDIA

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ASK THE EXPERT

# Logo Represents





**Vikas Agrawal | Founder & CEO**

Mr. Vikas Agrawal is a Founder and CEO of AIF & PMS Experts India, He is a MBA graduate with specialisation in finance. He has also persued the various investment courses from Flame University Pune. With over two decades of expertise in the Asset & Wealth Management Industry, he has established himself as an iconic figure for all of his financial educational programmes for HNI investors in India. He transmitted his alternate investment expertise via podcasts, YouTube videos, informative blogs, and so on displayed at [www.aifpms.com](http://www.aifpms.com). He has interviewed the best 100 brains for equities in India and shared their wisdoms with all the client members of AIF & PMS Experts India. His "Ask The Expert" show is particularly designed to provide expert opinions, information, and forecasts to the public as a way to keep them up-to-date in the best manner possible. He is one of the guest speaker at Zee Business in order to raise awareness about AIF & PMS industry and empower our country's overall wealth.

AIF & PMS Experts India was founded with the single goal of helping investors to participate in capital markets through AIF & PMS and enhance there overall experience and portfolio performance.



## Our Aim

To educate and empower our clients in the process of selecting right managers who can help achieving long term investment performance at the top of their peer group.

## Vision

To be the most respected AIF & PMS advisory Platform from India.

# What We Do?

01

At AIF & PMS Experts India, It is our attempt to build digital Platform,

02

Gathering data and insights from Fund houses,

03

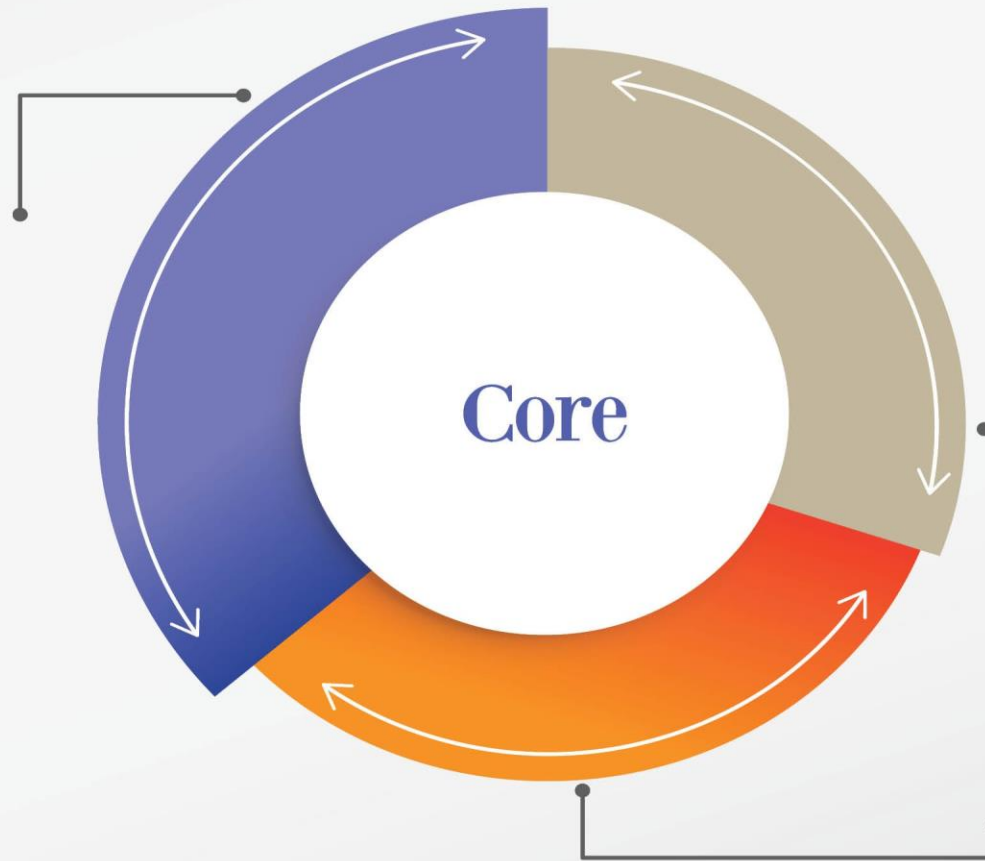
Filtering out fund basis our internal framework and then offering a simple experience for investment professionals, to allocate capital.

04

Across AIF and PMS strategies, manage portfolios, and enhance investor experience in alternative investments.

***Digital  
Infrastructure  
for Ecosystem***

Collaboration  
within all  
AIF & PMS  
manufactures'



***Fund Analytics***

Portfolio comparison  
basis various parameters

Portfolio Aggregation  
and Reporting

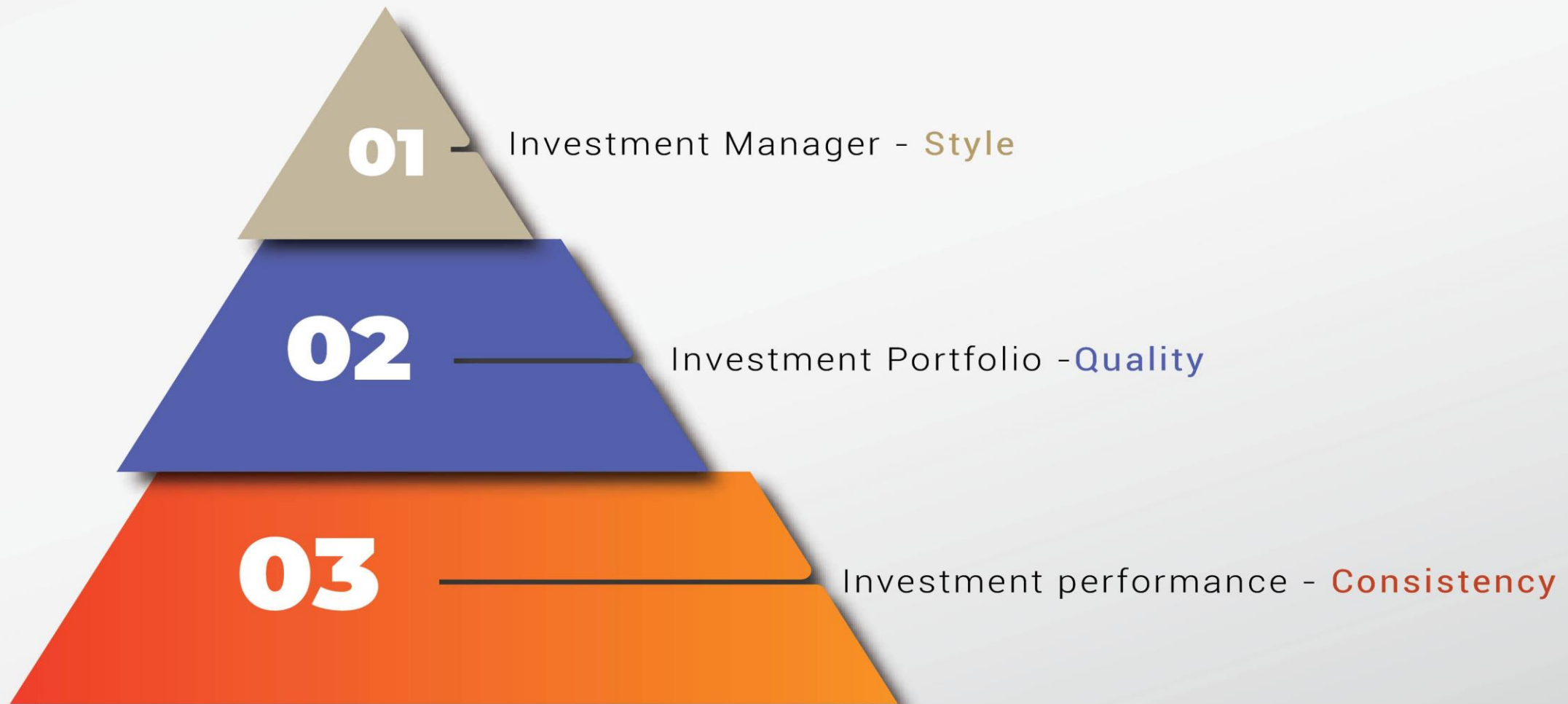
***Fundamentals***

Trust,  
Excellence in advisory  
& execution.



# Our Investment Process

Risk comes from focusing on 'Outcome' and not on 'Process', hence we have introduced our proprietary based **3I's** or **SQC** investment framework.







01

Long-term investors out-perform short-term investors.

02

Multi-asset class portfolios continue to reap benefits from diversification; however, looking through asset classes to "risk betas" is critical to ensuring true diversification.

03

Formulating an appropriate risk budget based on expected return targets and sticking to it (i.e., no market timing) will deliver the best investment results over the long-term.

04

Extreme market environments occasionally provide tactical asset allocation opportunities that can enhance investment returns.

05

The vast majority of active portfolio managers in India do justify their fees very well in the long run.

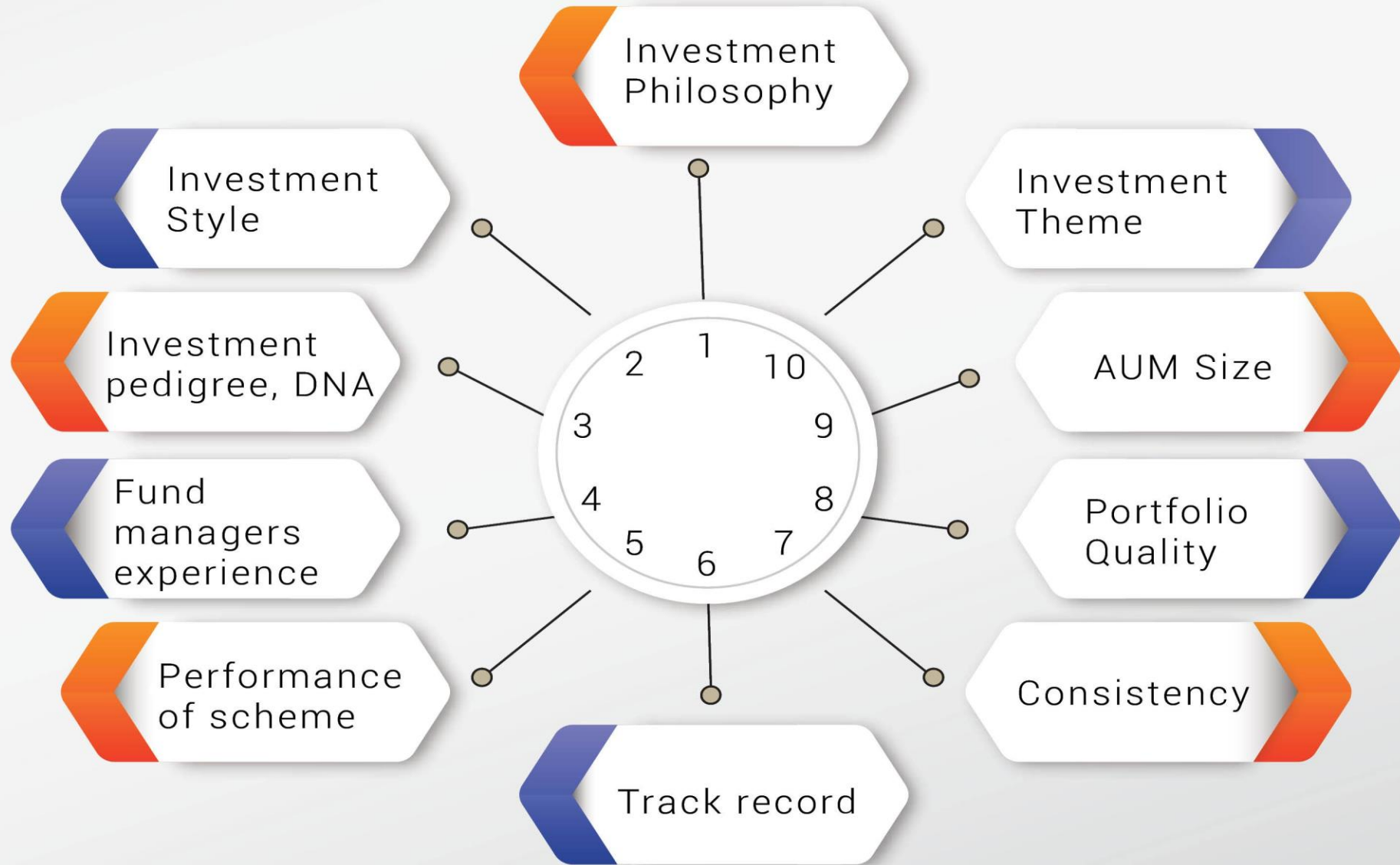
06

Picking active Portfolio managers who can outperform in the future requires deep research conducted by a highly specialized team.

07

In our opinion, properly constructed portfolio can deliver 1-5% of outperformance per annum over the market.

# Our Selection Process



# There are many companies but why choose us



## Expert & Qualified Team

Our team of ex-bankers brings with them a rich experience across the length and breadth of Wealth Management in the alternative space.

## Rigorous Selection Process

We follow our internal proprietary based framework (3I's or SQC) to select strategy for our clients. So every strategy has to clear the test of our internal parameters.



## Unbiased Advisory

We offer unbiased advisory for we work with individuals and not patronize any Institution or portfolio managers.

## Consistency Score

At AIF PMS Experts, we have developed a consistency score that tracks & monitors the most consistent portfolio and strategies over the volatile market condition.





# How do we add value?

1

Access to Interactive Sessions with Portfolio managers across India

2

Video call/Conference Calls for updating Quarterly Result Updates

3

Dedicated Relationship Manager

4

Investment basis client's risk profiler

5

Clients will get 24\*7 access to his portfolio on the web

6

Focused Portfolio Investments and client first approach



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