

PMS Performance

— **February 2025** —

True to our brand name, we are
Team “AIF & PMS Experts” that is:

- Process-driven investment approach
- Largest digital platform for AIF & PMS
- Dynamic team led by experienced leadership
- Trusted name with proven track record
- Commitment to eternal knowledge sharing
- Client-centric and customized wealth strategies
- Strategic partnerships based on thorough due diligence
- Technology-enhanced experience
- Robust compliance and governance

Our forte is AIFs, PMS and GIFT City
Investment options available in India.

February 2025



Why Predictions Fail: A Simple Guide for Investors

Dear Valuable Investors,

As an investor, you've probably seen predictions about where the stock market is heading, which sectors will rise, and when the economy will boom or crash. These predictions are made by experts, analysts, and in some cases by advanced computer based algorithms. But more often than not, they turn out to be incorrect. So, why do so many predictions fail? And more importantly, how can you as an investor make better decisions, even when predictions go wrong?

I believe that understanding about why predictions fail can help you become a smarter investor. Let's break it down in simple terms, with easy-to-understand examples, to help you avoid common pitfalls and make better and more informed choices.

Why Predictions Are Often Wrong?

1. Predictions Can't Always Account for the Unknown

Experts use data and trends to make predictions about the future. While this can give us an idea of what might happen, it can't predict everything. Sometimes, unexpected things happen that throw all the predictions off track.

For example, no one could have predicted the massive impact of the COVID-19 pandemic. The pandemic caused huge disruptions to economies around the world, something no one expected. Even experts who predicted steady growth for the economy were wrong because they couldn't foresee the pandemic

The Mitigating Factor: Instead of relying solely on predictions, diversify your investments. This means spreading your money across different types of investments (stocks, bonds, gold, real estate etc.) so that you are not dependent on one outcome. This can protect you if something unexpected happens.

2. Human Behavior Is Unpredictable

Humans often make decisions based on emotions, most commonly fear or greed. For example, during a stock market crash, many investors panic and sell their stocks, even though it might not be the best decision. This emotional reaction can cause big swings in the market that make predictions go wrong.

Take the rise of tech stocks during the pandemic, for instance. As people worked from home, tech companies that provided software or cloud services saw their stock prices shoot up. This wasn't predicted by many, but it happened because of a change in how people worked and lived.

The Mitigating Factor: Try to stay calm during market ups and downs. Don't make decisions based on emotions. Stick to your long-term plan, and avoid panic-selling during market dips.

3. Unexpected Events Can Change Everything

Sometimes, major "Black Swan" events can shake up the entire market. These events are rare and can't be predicted. Think of events like the 2008's global financial crisis or the COVID-19 pandemic.

These types of events can change the economy quickly and throw predictions out the window.

The Mitigating Factor: No one can predict these events, so it's important to have a strategy that can withstand surprises. Diversification is key. By investing in different sectors and asset classes, you can protect yourself from big losses when something unexpected happens.

4. Too Much Information Can Be Overwhelming

Today, we have access to more information than ever before. With so many news sources, social media updates, and opinions, it can be hard to figure out which information is important. Often, people pay attention to the wrong signals like small stock price fluctuations or sensational headlines when they should focus on bigger trends.

For instance, you might read an article predicting a quick rise in the stock price of a popular tech company because it just released a new product. However, these short-term predictions might miss the bigger picture, like whether the company's long-term business model is sustainable.

The Mitigating Factor: Focus on the big picture. Instead of jumping on the latest news or trend, look for solid, long-term investment opportunities that align to your goals.

5. Change Is The Only Constant

The world is changing fast. New technologies, new business models, and new consumer habits are constantly disrupting traditional ways.

Because things are changing so quickly, predictions based on old data or assumptions don't always work.

For example, in recent years, electric cars have become more popular, and companies that make electric vehicles (EVs) have seen their stock prices rise. This change came quickly and disrupted the traditional car industry, and many investors didn't see it coming.

The Mitigating Factor: Stay open to change. Watch for trends that could disrupt industries and think about how they might affect your investments. Keeping an eye on innovation can give you an edge in spotting new opportunities.

All in all, the predictions can be helpful, but they shouldn't be the sole basis for your investment decisions. By understanding the limitations of predictions and focusing on long-term growth, diversification, and risk management, you can navigate market uncertainties with confidence.

Remember, the most successful investors are those who stay calm, think strategically, and adjust their strategies when needed. Instead of relying on predictions, focus on building a solid investment foundation that can withstand the ups and downs of the market.

At AIF & PMS Experts, we have decades of experience navigating market uncertainties and helping investors make informed decisions, regardless of unpredictable events. Our team understands the complexities of financial markets and employs strategies designed to withstand volatility, ensuring long-term growth and stability. Instead of relying on unreliable predictions, we focus on solid investment principles that stand the test of time. At instances where you seek expert guidance and a steady hand to help you through market fluctuations, reach out to us, we're here to help you every step of the way.

Thanks & Regards

Vikas Agrawal

Founder & CEO

AIF & PMS Experts India

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AMC & SCHEME NAME	CATEGORY	DATE	STRATEGY PERFORMANCE								
		INCEPTION	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI
Alpha Alternatives Fund Systematic Equity	MULTICAP	21-Jul	-9.09%	-11.65%	-9.70%	13.80%	28.56%	16.32%	21.86%	17.44%	22.23%
Abakkus AI Cap Approach	LARGE CAP & MIDCAP	20-Oct	-5.97%	-7.96%	-9.00%	4.84%	20.53%	12.99%	NA	NA	26.58%
Alchemy Smart Alpha 250	LARGE CAP & MIDCAP	23-Aug	-13.82%	-9.94%	-16.78%	7.89%	NA	NA	NA	NA	24.88%
AAA Budding Beasts	MIDCAP	21-Jan	-7.42%	-7.28%	6.67%	17.99%	34.22%	23.92%	NA	NA	28.89%
AAA Focus Plan (AAAFP)	MULTICAP	24-Nov	4.00%	-4.41%	-4.16%	17.15%	20.16%	13.30%	16.82%	12.81%	14.56%
AAA INDIA OPPORTUNITY PLAN (AAA IOP)	MULTICAP	09-Nov	-5.0%	-5.7%	-4.4%	17.2%	25.2%	16.4%	19.9%	14.1%	18.7%
Abakkus Diversified Alpha Approach	MULTICAP	24-Jan	-6.25%	-8.95%	-8.73%	5.67%	NA	NA	NA	NA	6.01%
Abakkus Emerging	SMALLCAP	20-Aug	-9.32%	-9.25%	-1.69%	16.88%	33.34%	19.86%	NA	NA	34.03%
Abans Growth and Momentum	MULTICAP	12-Jan	-12.33%	-11.40%	-12.11%	4.34%	21.58%	12.76%	20.49%	15.09%	22.02%
Abans Smart Beta Portfolio	MIDCAP	19-Apr	-15.73%	-13.37%	-20.83%	-5.66%	22.63%	14.97%	15.58%	NA	16.01%
Accura Cap Alpha Gen	MULTICAP	15-Dec	-11.47%	-10.58%	-11.40%	3.72%	21.51%	11.58%	16.59%	NA	13.39%
Accura Cap Dynamo	SMALLCAP	16-Dec	9.56%	-8.41%	8.86%	14.37%	45.62%	26.33%	35.00%	NA	25.20%
Accura Cap PICOPOWER	SMALLCAP	11-Oct	-13.52%	11.08%	-11.68%	8.66%	30.06%	15.71%	28.79%	17.71%	23.19%
Accura Cap Alpha 10	LARGE CAP	Sep-11	-5.32%	-6.45%	-9.19%	2.10%	15.68%	9.23%	12.09%	11.03%	13.71%
ACE Mid cap	MIDCAP	17-Dec	-6.68%	-9.28%	-17.63%	2.64%	40.29%	28.51%	27.63%	NA	19.33%
ACE Multicap	MULTICAP	18-Aug	-4.64%	-5.99%	-14.97%	2.48%	43.90%	33.05%	30.68%	NA	21.27%
ACE 15	LARGE CAP	17-Dec	-1.66%	-2.72%	-8.94%	7.15%	26.17%	19.59%	19.65%	NA	13.35%
Aditya Birla Select Sector Portfolio	SMALLCAP	09-Oct	-5.99%	-3.21%	0.48%	28.44%	35.27%	24.03%	26.18%	NA	17.44%
Alchemy Alpha Small Cap	SMALLCAP	23-Dec	-16.00%	-13.35%	-10.21%	6.30%	NA	NA	NA	NA	17.31%
Alchemy Alpha 100	LARGE CAP	23-Aug	-4.72%	-9.27%	13.95%	3.75%	NA	NA	NA	NA	14.90%
Alchemy Ascent	MULTICAP	19-Sep	-15.93%	-17.18%	-22.50%	-4.85%	22.41%	9.85%	NA	NA	17.00%
Alchemy High Growth	MULTICAP	02-May	12.34%	-12.05%	-23.55%	-4.05%	18.43%	9.44%	9.76%	8.95%	20.19%
Alchemy High Growth Select Stock	MULTICAP	08-Dec	13.13%	-7.19%	-5.07%	19.04%	30.58%	15.84%	17.96%	14.88%	20.15%
Alchemy Smart Alpha Small cap and Micro cap	SMALLCAP	23-Dec	-14.75%	-11.18%	-16.34%	2.25%	NA	NA	NA	NA	14.62%
ALPHA ALTERNATIVES SYSTEMATIC EQUITY	MULTICAP	21-Jul	-9.09%	11.65%	9.70%	13.80%	28.56%	16.32%	21.86%	17.44%	22.23%
Alf Accurate - AAA IOP	MULTICAP	09-Nov	-4.95%	-5.69%	-4.44%	17.20%	25.22%	16.44%	19.86%	14.08%	18.68%
AMBITALPHA GROWTH	MULTICAP	JAN-21	-15.40%	-13.00%	12.50%	17.90%	46.70%	25.60%	NA	NA	29.90%
Ambit - Coffee Can	LARGE CAP	17-Mar	-3.61%	-3.34%	3.47%	14.33%	16.70%	8.86%	11.95%	NA	14.00%
Ambit - Emerging Giants	SMALLCAP	17-Dec	-12.39%	-14.61%	-12.89%	-6.93%	8.11%	6.47%	17.16%	NA	13.12%

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AMC & SCHEME NAME	CATEGORY	DATE	STRATEGY PERFORMANCE								
		INC.	1M	3	6M	1Y	2Y	3Y	5Y	10Y	SI
Ambit-Good& Clean Midcap Portfolio	MIDCAP	15-Mar	-7.48%	-6.84%	-8.69%	16.48%	24.59%	14.36%	16.54%	NA	14.69%
Ambit TenX	MULTICAP	21-Dec	-8.84%	-9.65%	-10.66%	5.94%	17.15%	10.94%	NA	NA	10.04%
ANAND RATHI- Impress PMS	MULTICAP	17-May	-10.13%	4.82%	-2.63%	21.35%	31.23%	20.42%	27.51%	NA	15.52%
ANANDRATHI-DecenniumOpportunity	MULTICAP	21-Nov	-13.34%	-9.61%	-13.29%	4.22%	24.36%	15.46%	NA	NA	13.17%
AnandRathi-MNCPMS	THEMATIC	18-Mar	-6.71%	-11.81%	-14.54%	6.09%	15.62%	9.19%	13.92%	NA	12.10%
ASK-IndianEntrepreneurPortfolio	MULTICAP	10-Jan	-3.58%	-5.10%	-8.06%	6.34%	15.33%	6.85%	12.35%	12.39%	16.57%
ASK-Indian Select Portfolio	MULTICAP	10-Jan	-6.18%	-7.11%	-11.97%	4.42%	16.16%	6.95%	10.87%	10.94%	14.80%
Badjate Stock Aggressive	SMALLCAP	21-Jul	-12.31%	-8.06%	-6.25%	20.65%	51.64%	26.80%	NA	NA	26.15%
BayCapitalIndia Opportunites Portfolio (PMS)	MULTICAP	23-Jan	-5.26%	-5.36%	-4.66%	7.30%	NA	NA	NA	NA	20.30%
Bonanza Aegis	MULTICAP	22-May	-9.61%	-2.00%	0.89%	23.10%	42.89%	NA	NA	NA	33.17%
Bonanza Edge	MULTICAP	15-Aug	-5.71%	-6.61%	-10.92%	2.61%	35.34%	25.04%	33.53%	NA	21.37%
Bonanza Growth	LARGECAP	10-Apr	-7.87%	-6.40%	-8.74%	0.31%	16.39%	10.58%	16.02%	14.65%	17.28%
Bonanza Multicap	MULTICAP	18-July	-13.32%	-10.11%	-11.51%	2.45%	37.49%	23.74%	31.34%	NA	24.11%
Bonanza Value	MULTICAP	11-Sep	-10.04%	-9.58%	-16.46%	-0.95%	31.28%	18.05%	22.76%	13.95%	20.39%
BugleRock o3Special Situations Portfolio	SMALLCAP	22-Aug	-8.53%	-8.17%	-11.93%	4.47%	35.59%	NA	NA	NA	36.83%
BugleRock ThematicOpportunities Portfolio	THEMATIC	22-Nov	-4.31%	-8.88%	-16.19%	0.21%	13.55%	NA	NA	NA	10.46%
BugleRockCoreValueConcentrated Option	MULTICAP	19-Apr	-4.12%	-3.51%	-4.34%	16.03%	21.66%	16.48%	17.78%	NA	15.84%
BugleRockCore Value RegularOption	MULTICAP	19-May	-5.30%	-5.44%	-8.64%	15.19%	24.40%	19.61%	18.45%	NA	17.85%
BuoyantOpportunities Scheme	FLEXICAP	16-Jun	-2.57%	-2.25%	-3.25%	14.50%	26.69%	17.53%	24.71%	NA	21.97%
Cap Grow Growth Strategy	MULTICAP	18-Aug	-6.84%	-8.74%	-7.28%	7.54%	16.79%	8.84%	13.08%	NA	12.60%
CapGrow SPECIALSITUATIONINV. APPROACH	MULTICAP	18-Oct	-6.63%	0.18%	-2.94%	13.06%	26.73%	15.15%	25.55%	NA	19.69%
CAPITALMINDSurgeIndia	MULTICAP	17-Nov	-9.26%	-7.78%	-12.55%	14.09%	32.73%	18.73%	20.98%	NA	12.53%
CarnelianAsset ManagementandAdvisor Pvt Ltd- YNG Strategy	MULTICAP	22-Jan	-7.32%	-9.28%	-12.48%	8.38%	44.71%	34.42%	NA	NA	34.24%
Carnelian Capital Compounder Strategy	LARGECAP	19-May	-6.42%	-8.19%	-7.12%	11.51%	27.06%	16.16%	17.44%	NA	18.78%
CARNELIAN Shift Strategy	SMALLCAP	20-Oct	-6.77%	-3.63%	2.17%	22.62%	46.29%	30.22%	NA	NA	41.47%
COMPOSITE Emerging Star Fund	SMALLCAP	19-May	-8.27%	-7.86%	-1.22%	24.80%	32.66%	17.14%	22.80%	NA	22.60%
COUNTER CYCLICAL DIVERSIFIED LONG TERM VALUE	SMALLCAP	19-July	-6.24%	-1.16%	1.84%	25.21%	43.27%	37.51%	66.39%	NA	58.64%
Dynamic Equities Blue-chip	LARGECAP	24-Mar	-12.87%	-4.95%	-11.74%	NA	NA	NA	NA	NA	21.91%

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AMC & SCHEME NAME	CATEGORY	DATE	STRATEGY PERFORMANCE								
		INC.	1M	3	6M	1Y	2Y	3Y	5Y	10 Y	SI
ELECTRUMPORTFOLIOLAureatePortfolio	SMALLCAP	20-Nov	-12.27%	-7.61%	3.83%	23.32%	39.99%	27.72%	NA	NA	37.96%
EquirusCore Equity	MIDCAP	16-Oct	-5.91%	-8.53%	-7.59%	4.27%	14.78%	NA	NA	NA	14.94%
EQUITREE EMERGING OPPORTUNITIES	SMALLCAP	17-Oct	-6.27%	2.38%	0.32%	31.21%	62.25%	35.70%	39.27%	NA	9.54%
EquirusLong Horizon Fund	SMALLCAP	16-Oct	-13.21%	-12.53%	9.67%	-0.65%	23.11%	10.27%	25.29%	NA	21.41%
First Global-IMAAP	MULTIASSET	20-Feb	-3.67%	-5.99%	5.32%	2.79%	17.75%	10.50%	NA	NA	16.00%
First Global-TheIndia Super50(IS50)	MULTICAP	20-Feb	-5.82%	-8.64%	-9.26%	1.16%	20.04%	10.66%	NA	NA	22.13%
FractalFCILLP OPPORTUNITIES	MULTICAP	22-Jun	-5.13%	-6.68%	-1.25%	18.00%	30.43%	NA	NA	NA	28.07%
GlobeCapital MarketLtd Value	MULTICAP	07-Oct	-5.42%	-6.41%	-11.10%	0.70%	17.76%	16.00%	18.82%	17.81%	17.69%
GlobeCapital MarketLtd ARBITRAGE	MULTICAP	08-Jan	-3.63%	-5.81%	-9.75%	0.23%	18.90%	15.57%	21.07%	16.10%	15.77%
GIRIK WEALTH MULTICAP GROWTH EQUITY STRATEGY	MULTICAP	09-Dec	-6.23%	-5.76%	-7.56%	12.60%	35.60%	17.10%	23.24%	17.51%	20.64%
GREEN LANTERN ALPHA FUND	LARGE CAP & MIDCAP	FEB-20	-3.52%	-6.59%	-10.62%	15.98%	44.34%	31.88%	NA	NA	35.58%
Green Lantern Growth Fund	MIDCAP	17-Dec	-4.23%	-4.40%	-9.17%	28.01%	62.52%	43.90%	46.96%	NA	25.64%
GREENPORTFOLIO SPECIAL	MULTICAP	18-Jul	-8.49%	-5.87%	-6.92%	12.11%	29.87%	18.41%	27.69%	NA	25.61%
GREENPORTFOLIO- Super30DynamicFund	THEMATIC	19-Sep	-8.46%	-3.40%	1.55%	19.81%	38.91%	24.60%	35.96%	NA	33.29%
GREENPORTFOLIO-Dividend YieldFund	THEMATIC	19-Sep	-2.46%	-0.27%	-2.26%	6.87%	43.41%	27.66%	35.87%	NA	33.71%
GREENPORTFOLIO-MNC Advantage Fund	THEMATIC	19-Sep	-8.23%	-9.30%	-13.07%	6.88%	29.08%	20.01%	26.60%	NA	25.13%
GREENPORTFOLIO-The Impact ESGFund	THEMATIC	22-Mar	-8.07%	-9.27%	-7.06%	19.63%	45.01%	NA	NA	NA	35.50%
Helios-India Rising Portfolio	MULTICAP	20-Mar	-7.94%	-5.10%	-5.67%	12.54%	26.96%	14.89%	NA	NA	22.95%
ICICI Prudential PMS Contra Strategy	MULTICAP	18-Sep	-4.23%	6.43%	-9.16%	9.64%	25.01%	20.39%	24.00%	NA	19.99%
ICICI Prudential PMS Largecap Strategy	LARGE CAP	9-Mar	-3.66%	-7.62%	-9.24%	13.91%	25.37%	18.22%	21.72%	13.11%	16.39%
ICICI Prudential PMS PIPE Strategy	SMALLCAP	19-Sep	-6.70%	-5.84%	-5.43%	12.61%	35.75%	28.38%	30.20%	NA	29.58%
ICICI Prudential PMS Value Strategy	MULTICAP	04-Jan	-5.41%	-7.44%	-9.98%	8.90%	31.72%	26.04%	24.22%	15.05%	13.07%
InCred Health care portfolio	THEMATIC	21-Feb	-3.98%	-2.09%	18.67%	33.94%	42.67%	24.39%	NA	NA	20.72%
InCred Focused Health care portfolio	THEMATIC	23-Jul	-0.26%	1.50%	26.70%	47.87%	NA	NA	NA	NA	62.64%
InCred Multicap Portfolio	MULTICAP	21-Feb	-8.24%	-8.05%	-0.36%	23.44%	37.50%	21.86%	NA	NA	19.50%
InCred Small & Midcap Portfolio	SMALLCAP	21-May	-8.60%	-8.79%	-2.10%	20.57%	34.12%	22.45%	NA	NA	18.02%
INVASSET Growthfund	MULTICAP	20-Jan	1.10%	1.13%	-19.66%	0.51%	52.99%	34.23%	34.04%	NA	34.30%
Invesco India Caterpillar Portfolio	MIDCAP	6-Jun	-9.68%	-7.81%	-4.20%	20.21%	30.05%	16.72%	24.72%	12.79%	12.60%
Invesq Multicap Opportunities Portfolio	MULTICAP	24-May	-9.64%	-9.57%	3.67%	NA	NA	NA	NA	NA	3.94%
INVESTSAVVY Alpha Fund	MULTICAP	22-Apr	-10.86%	-10.73%	-5.31%	23.55%	55.68%	NA	NA	NA	40.81%
Joindre Value Fund	MULTICAP	18-Nov	-8.64%	-8.46%	-8.38%	9.83%	16.66%	8.97%	13.22%	NA	13.67%
Karma Capital Jasmine	MULTICAP	23-Aug	-3.22%	-6.35%	-7.21%	10.13%	NA	NA	NA	NA	15.31%
Karma Capital Lotus	SMALLCAP	23-Feb	-6.77%	-7.86%	-5.85%	10.07%	NA	NA	NA	NA	30.30%

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		INC.	1M	3	6M	1Y	2Y	3Y	5Y	10Y	SI
KarmaCapital Magnolia	LARGECAP	23-Feb	-1.33%	-2.89%	-7.06%	10.84%	NA	NA	NA	NA	18.77%
Ladderup Proud PMS	MULTICAP	23-May	-7.62%	-6.09%	6.09%	8.61%	NA	NA	NA	NA	15.19%
Magadh Capital Adviore LLPFuturestarts	MULTICAP	21-Aug	-8.30%	-1.67%	-1.64%	22.91%	48.05%	28.34%	NA	NA	26.09%
MarcellusLittleChamps	MIDCAP	19-Aug	-4.54%	-5.20%	-7.94%	-0.98%	-0.58%	-3.62%	11.17%	NA	13.95%
MarcellusRising Giants Portfolio	MIDCAP	21-Dec	-2.16%	-3.93%	-2.08%	11.50%	12.06%	0.32%	NA	NA	-1.09%
MASTERPORTFOLIOMASTERTRUST INDIA GROWTH STRATEGY	LARGECAP& MIDCAP	OCT-11	-7.88%	-8.59%	-10.80%	-0.57%	23.46%	13.61%	26.02%	21.27%	25.49%
Moat-Emerging Moat Fund	MULTICAP	22-sep	-5.46%	-9.42%	-11.31%	8.71%	23.84%	NA	NA	NA	19.42%
MOLECULE GROWTH	SMALLCAP	MAY-21	-9.67%	-5.52%	-8.71%	-3.53%	30.09%	30.88%	NA	NA	30.55%
MONEY GROW SMALL MID CAP	SMALLCAP	DEC-23	-8.66%	-11.88%	-13.75%	27.29%	NA	NA	NA	NA	30.60%
Motilal Oswal Mid To MegaStrategy	SMALLCAP	19-Dec	-12.10%	-8.12%	-2.93%	19.21%	39.32%	16.38%	26.35%	NA	26.25%
MotilalOswal-FOUNDERS	MULTICAP	23-Mar	-16.47%	-10.51%	-5.87%	18.68%	NA	NA	NA	NA	39.97%
MotilalOswal-VALUEMIGRATION	MULTICAP	03-Feb	-14.51%	-11.40%	-7.47%	14.65%	31.64%	18.65%	16.76%	10.88%	19.78%
NAFAAssets ManagerPvt Ltd –CleanTech Portfolio	MIDCAP	21-Sep	-8.96%	-6.50%	-8.37%	24.11%	40.23%	25.73%	NA	NA	30.11%
NAFASMALLCAPPORFOLIO	SMALLCAP	19-Mar	-6.20%	-7.42%	-10.47%	7.30%	21.05%	14.47%	24.39%	NA	20.55%
NEGENCAPITALSPECIALSITUATIONS& TECHNOLOGY FUND	MULTICAP	17-Aug	-9.81%	-8.33%	-3.59%	13.81%	37.53%	22.05%	33.59%	NA	18.65%
NINE RIVERS AURUM SMALL CAP OPPORTUNITIES	SMALLCAP	12Dec	-5.50%	-6.80%	-1.30%	12.50%	27.10%	14.90%	NA	NA	17.80%
NuvamaAbsolute Return Strategy(NARS)	MIDCAP	23-Jun	0.70%	0.50%	1.70%	10.80%	NA	NA	NA	NA	11.90%
NuvamaEquitieseeXpansion Target(NEXT)	MIDCAP	23-Jul	-6.80%	-7.80%	-3.10%	14.80%	NA	NA	NA	NA	25.50%
PaceFinanciallyInvestment AdviserPvt Ltd- Smart Alpha	MULTIASSET	24-Jul	-2.23%	-1.10%	2.00%	NA	NA	NA	NA	NA	4.01%
PhillipEmerging India Portfolio(PEIP)	MIDCAP	17-Sep	-7.94%	-8.04%	-8.72%	2.67%	17.72%	10.97%	16.99%	NA	13.26%
PhillipSignatureIndia Portfolio(PSIP)	MULTICAP	16-May	-6.50%	-8.46%	-8.72%	2.42%	13.80%	7.37%	14.10%	NA	12.02%
Prabhudas LilladherPvtLtd-AQUA	MULTICAP	23-Jun	-11.18%	-11.96%	-16.11%	-2.62%	NA	NA	NA	NA	29.57%
Prabhudas Lilladher-Multi Asset DynamicPortfolio Alpha	MULTIASSET	23-Sep	-2.05%	-4.10%	-6.18%	3.37%	14.13%	9.97%	NA	NA	8.12%
Quest-Quest FlagshipPMS	MULTICAP	07-Oct	-11.53%	-9.95%	-6.90%	15.98%	24.80%	11.94%	17.87%	13.21	16.54%
Quest-MultiPMS	MULTICAP	24-Aug	-12.39%	-11.14%	-8.53%	16.86%	28.19%	15.85%	21.90%	15.14%	16.40%
Renaissance India Next Portfolio	MULTICAP	18-Apr	-6.37%	-8.47%	-5.75%	14.73%	27.96%	22.07%	25.12%	NA	16.97%
RenaissanceMidcap Portfolio	MIDCAP	18-Jan	-7.87%	-11.41%	-13.76%	0.56%	23.25%	18.15%	21.08%	NA	13.10%
Renaissance Opportunities Portfolio	LARGECAP	18-Jan	-4.78%	-3.12%	-5.89%	12.35%	24.31%	16.36%	20.32%	NA	14.00%

AMC & SCHEME NAME	CATEGORY	INC.	STRATEGY PERFORMANCE								
		Date	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI
Right Horizons -FlexiCap	MULTICAP	12-Nov	-10.38%	-12.06%	-10.74%	2.25%	18.31%	10.53%	19.11%	12.17%	11.36%
RightHorizons- India Business Leader	LARGE CAP	12-Nov	-7.70%	-8.40%	-8.03%	11.20%	21.70%	12.53%	17.28%	10.28%	11.34%
RightHorizons- Perennial	MULTICAP	21-Apr	-12.13%	-7.15%	2.37%	14.44%	34.95%	17.93%	NA	NA	19.10%
RightHorizons Super-ValueAggressive Fund	SMALLCAP	23-May	-14.48%	-7.17%	0.64%	19.52%	NA	NA	NA	NA	40.01%
Roha- Emerging Champions Portfolio	SMALLCAP	20-Sep	-13.19%	-9.62%	-7.89%	8.60%	35.55%	19.19%	NA	NA	36.73%
Sage One Largeand Midcap Portfolio	LARGE CAP & MIDCAP	22-Apr	-4.50%	-5.31%	-5.64%	21.36%	33.00%	NA	NA	NA	20.30%
SAMVITTI PMS ACTIVE ALPHA MULTICAP	MULTICAP	21-Apr	-15.97%	-11.14%	-13.04%	14.73%	52.34%	36.49%	NA	NA	35.07%
SageOneCore Portfolio	SMALLCAP	12-Apr	-4.5%	-5.3%	-5.6%	21.4%	33.0%	NA	NA	NA	20.3%
SageOne Small& Micro cap Portfolio	SMALLCAP	19-Apr	-10.2%	-10.3%	-8.0%	-2.1%	19.2%	8.4%	27.1%	NA	24.8%
SBIAEON ALPHAPMS	MULTICAP	22-Jan	-9.57%	-9.43%	-9.20%	10.18%	25.40%	16.89%	NA	NA	16.48%
SMC GrowthStrategy	MULTICAP	Oct-19	-7.44%	-7.57%	-10.30%	3.56%	17.27%	12.60%	15.69%	NA	15.34%
SparkAsia@75coreandSatellite strategy	MULTICAP	19-Jun	-3.34%	-6.75%	-10.54%	3.18%	23.54%	17.95%	22.77%	NA	21.31%
SparkAsiaImpactManagers@75Flexicap strategy	MULTICAP	Feb-19	-2.79%	-5.59%	-9.45%	4.99%	24.59%	18.00%	18.98%	NA	17.84%
Stallion Asset Core Fund	MULTICAP	18-Oct	-12.22%	-7.93%	4.35%	42.06%	57.35%	32.75%	32.39%	NA	30.84%
SundaramIndia SecularOpportunities Portfolio (SISOP)	MULTICAP	10-Feb	-7.52%	-2.31%	2.02%	23.44%	23.18%	12.24%	17.19%	11.43%	17.75%
SundaramRising Stars Portfolio	SMALLCAP	9-Nov	-3.72%	-3.30%	-1.46%	0.44%	12.57%	7.44%	15.32%	9.83%	14.04%
SundaramVoyagerPortfolio	MULTICAP	11-Oct	-7.52%	-0.65%	2.63%	24.50%	25.63%	12.03%	19.77%	NA	13.53%
SVANINVESTMENT VELOCITY	SMALLCAP	JUL-23	-5.66%	-1.08%	2.92%	29.49%	NA	NA	NA	NA	43.41%
TurtleWealthWealthMantra	MULTICAP	19-Sep	-4.93%	-6.21%	-11.45%	5.59%	24.48%	14.01%	15.89%	NA	16.50%
UNIQUE STRATEGIC FUND	THEMATIC	DEC-19	-5.88%	-7.88%	-11.32%	18.15%	39.35%	29.86%	34.17%	NA	35.90%
UNIFIAPJ 20	MIDCAP	15-Sep	-8.09%	-6.76%	-7.78%	4.90%	27.73%	15.65%	31.65%	NA	21.94%
UNIFIBCAD	MIDCAP	18-May	-5.44%	-6.45%	-10.49%	-0.58%	17.58%	9.49%	18.31%	NA	15.07%
UNIFI BCAD2 BREAKOUT 20	MIDCAP	22- Jan	-6.61%	-7.49%	-10.04%	3.60%	18.73%	13.55%	NA	NA	14.58%
UNIFI BLENDED RANGOLI	FLEXICAP	17-Jun	-5.32%	-5.79%	-8.80%	4.05%	19.59%	11.56%	26.26%	NA	20.29%
UNIFI INSIDER SHADOW	MIDCAP	10-May	-4.92%	-6.26%	-7.92%	0.16%	16.00%	9.01%	23.36%	NA	15.15%
ValcreateGrowing India	MULTICAP	23-Feb	-8.73%	-11.84%	-17.50%	4.63%	NA	NA	NA	NA	19.40%
Valcreate IME Digital Disruption	THEMATIC	23-Feb	-15.33%	-4.10%	4.16%	28.40%	NA	NA	NA	NA	39.60%
ValcreateIMEMicrotrends	MULTICAP	23-Feb	-6.07%	-7.36%	-8.94%	9.21%	NA	NA	NA	NA	24.41%
Valcreate Lifesciences	THEMATIC	23-Feb	-9.34%	-12.75%	-8.38%	14.68%	NA	NA	NA	NA	18.21%
ValueQuestGrowth	MULTICAP	10-Oct	-8.23%	-6.33%	-6.61%	15.46%	32.8%	17.48%	28.84%	15.45%	18.43%
ValueQuestPlatinum	MULTICAP	14-Jul	-8.62%	-4.22%	-3.68%	21.78%	37.59%	19.69%	32.23%	20.39%	20.92%
ValueQuestPoise	MULTICAP	22-Feb	-11.32%	-12.55%	-15.64%	-5.71%	16.35%	NA	NA	NA	17.64%
WALLFORTAmeya Fund	SMALLCAP	22-Dec	-6.85%	-4.67%	15.73%	27.19%	NA	NA	NA	NA	67.40%
WALLFORT Diversified Fund	SMALLCAP	18-Nov	-3.06%	-1.43%	1.82%	50.04%	66.34%	37.57%	40.24%	NA	27.77%

February 2025

Benchmark	PERFORMANCE								
	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
BSE500 TRI	-3.4%	-4.8%	-8.2%	9.7%	21.0%	14.2%	18.3%	13.0%	12.8%
S&P BSE 500 - TRI	-3.43%	-4.82%	-8.23%	9.73%	21.00%	14.17%	18.26%	13.00%	16.01%
S&P BSE 500 - TRI	-3.4%	-4.8%	-8.2%	9.7%	21.0%	14.2%	18.2%	13.0%	12.6%
BSE500 TRI	-3.43%	-4.82%	-8.23%	9.73%	20.98%	14.17%	18.25%	13.00%	13.80%

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February 2025

Top1 Month Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1M	3M	6	1Y	2Y	3Y	5Y	10Y	SI
MAXIMAL CAPITAL INCOME FUND	JUN-22	2.49%	-0.57%	3.52%	13.27%	21.89%	NA	NA	NA	19.93%
ITHOUGHT FINANCIAL SPHERE	DEC-21	1.42%	-4.14%	1.59%	23.69%	26.89%	22.10%	NA	NA	21.96%
INVASSET LLP GROWTH PRO MAX	JAN-20	1.10%	1.13%	-19.66%	0.51%	52.99%	34.23%	34.04%	NA	34.30%
ESTEE ADVISORS PVT LTD IALPHA	SEP-09	1.06%	3.35%	7.94%	14.46%	12.80%	10.92%	9.80%	10.84%	11.75%
PROFUSION INVESTMENT ADVISORS LLP INCOME ENHANCER	MAY-21	1.02%	1.18%	3.17%	7.11%	9.48%	8.49%	NA	NA	9.41%
NEO ASSET MANAGEMENT PVT LTD NEO YIELD ENHANCER	JAN-24	0.98%	2.57%	5.51%	10.80%	NA	NA	NA	NA	11.24%
KARVY CAPITAL LTD EXCEL	NOV-16	0.87%	2.51%	5.23%	11.34%	11.43%	11.23%	11.14%	NA	10.61%
PELICAN HOLDINGS PVT LTD PE FUND	JUN-18	0.73%	-1.98%	-6.98%	4.06%	15.36%	10.28%	13.44%	NA	11.17%
NUVAMA ASSET MANAGEMENT LIMITED ABSOLUTE RETURN STRATEGY	JUN-23	0.70%	0.50%	1.70%	10.80%	NA	NA	NA	NA	11.90%

Top1 Year Performers

AMC & SCHEME NAME	INC.	STRATEGY PERFORMANCE								
	DATE	1	3M	6	1Y	2Y	3	5	10Y	SI
WALLFORT DIVERSIFIED FUND	NOV-18	-3.06%	-1.43%	1.82%	50.04%	66.34%	37.57%	40.24%	NA	27.77%
INCRED FOCUSED HEALTHCARE PORTFOLIO	JUL-23	-0.26%	1.50%	26.70%	47.87%	NA	NA	NA	NA	62.64%
STALLION ASSET CORE FUND	OCT-18	-12.22%	-7.93%	4.35%	42.06%	57.35%	32.75%	32.39%	NA	30.84%
INCRED ASSET MANAGEMENT HEALTHCARE PORTFOLIO	FEB-21	-3.98%	-2.09%	18.67%	33.94%	42.67%	24.39%	NA	NA	20.72%
EQUITREE CAPITAL EMERGING OPPORTUNITIES	OCT-17	-6.27%	2.38%	0.32%	31.21%	62.25%	35.70%	39.27%	NA	9.54%
SVAN INVESTMENT VELOCITY	JUL-23	-5.66%	-1.08%	2.92%	29.49%	NA	NA	NA	NA	43.41%
ADITYA BIRLA SELECT SECTOR PORTFOLIO	OCT-09	-5.99%	-3.21%	0.48%	28.44%	35.27%	24.03%	26.18%	NA	17.44%
VALCREATE IME DIGITAL DISRUPTION	FEB-23	-15.33%	-4.10%	4.16%	28.40%	NA	NA	NA	NA	39.60%
GREEN LANTERN GROWTH FUND	DEC-17	-4.23%	-4.40%	-9.17%	28.01%	62.52%	43.90%	46.96%	NA	25.64%
MONEY GROW SMALL MIDCAP	DEC-23	-8.66%	-11.88%	-13.75%	27.29%	NA	NA	NA	NA	30.60%

Top3 Year Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10	SI
GREEN LANTERN GROWTH FUND	DEC-17	-4.23%	-4.40%	-9.17%	28.01%	62.52%	43.90%	46.96%	NA	25.64%
WALLFORT DIVERSIFIED FUND	NOV-18	-3.06%	-1.43%	1.82%	50.04%	66.34%	37.57%	40.24%	NA	27.77%
COUNTER CYCLICAL DIVERSIFIED LONG TERM VALUE	JUL-19	-6.24%	-1.16%	1.84%	25.21%	43.27%	37.51%	66.39%	NA	58.64%
SAMVITTI PMS ACTIVE ALPHA MULTICAP	APR-21	-15.97%	-11.14%	-13.04%	14.73%	52.34%	36.49%	NA	NA	35.07%
EQUITREE EMERGING OPPORTUNITIES	OCT-17	-6.27%	2.38%	0.32%	31.21%	62.25%	35.70%	39.27%	NA	9.54%
CARNELIAN YNG STRATEGY	JAN-22	-7.32%	-9.28%	-12.48%	8.38%	44.71%	34.42%	NA	NA	34.24%
INVASSET GROWTH PRO MAX	JAN-20	1.10%	1.13%	-19.66%	0.51%	52.99%	34.23%	34.04%	NA	34.30%
ASIT C MEHTA ACE - MULTICAP	AUG-18	-4.64%	-5.99%	-14.97%	2.48%	43.90%	33.05%	30.68%	NA	21.27%
STALLION CORE FUND	OCT-18	-12.22%	-7.93%	4.35%	42.06%	57.35%	32.75%	32.39%	NA	30.84%

Top5 Year Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10	SI
COUNTER CYCLICAL DIVERSIFIED LONG TERM VALUE	JUL-19	-6.24%	-1.16%	1.84%	25.21%	43.27%	37.51%	66.39%	NA	58.64%
GREEN LANTERN GROWTH FUND	DEC-17	-4.23%	-4.40%	-9.17%	28.01%	62.52%	43.90%	46.96%	NA	25.64%
MONEYBEE QUEENBEE	AUG-07	-11.11%	-9.84%	-0.19%	21.61%	45.34%	29.49%	41.53%	16.76%	22.05%
WALLFORT DIVERSIFIED FUND	NOV-18	-3.06%	-1.43%	1.82%	50.04%	66.34%	37.57%	40.24%	NA	27.77%
EQUITREE EMERGING OPPORTUNITIES	OCT-17	-6.27%	2.38%	0.32%	31.21%	62.25%	35.70%	39.27%	NA	9.54%
GREEN PORTFOLIO SUPER 30 DYNAMIC	SEP-19	-8.46%	-3.40%	1.55%	19.81%	38.91%	24.60%	35.96%	NA	33.29%
GREEN PORTFOLIO DIVIDEND YIELD	SEP-19	-2.46%	-0.27%	-2.26%	6.87%	43.41%	27.66%	35.87%	NA	33.71%
ACCURACAP DYNAMO	DEC-16	-9.56%	-8.41%	-8.86%	14.37%	45.62%	26.33%	35.00%	NA	25.20%
UNIQUE ASSET DYNAMO STRATEGIC FUND	DEC-19	-5.88%	-7.88%	-11.32%	18.15%	39.35%	29.86%	34.17%	NA	35.90%

Top 10 Year Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10	SI
MASTER TRUST INDIA GROWTH STRATEGY	OCT-11	-7.88%	-8.59%	-10.80%	-0.57%	23.46%	13.61%	26.02%	21.27%	25.49%
VALUEQUEST PLATINUM	JUL-14	-8.62%	-4.22%	-3.68%	21.78%	37.59%	19.69%	32.23%	20.39%	20.92%
GLOBE CAPITAL VALUE	OCT-07	-5.42%	-6.41%	-11.10%	0.70%	17.76%	16.00%	18.82%	17.81%	17.69%
ACCURACAP PICOPOWER	OCT-11	-13.52%	-11.08%	-11.68%	8.66%	30.06%	15.71%	28.79%	17.71%	23.19%
GIRIK WEALTH MULTICAP GROWTH EQUITY STRATEGY	DEC-09	-6.23%	-5.76%	-7.56%	12.60%	35.60%	17.10%	23.24%	17.51%	20.64%
ALPHA ALTERNATIVES SYSTEMATIC EQUITY	JUL-21	-9.09%	-11.65%	-9.70%	13.80%	28.56%	16.32%	21.86%	17.44%	22.23%
NINE RIVERS AURUM SMALL CAP OPPORTUNITIES	DEC-12	-11.40%	-10.50%	-11.50%	-0.40%	28.60%	17.50%	31.20%	17.30%	27.07%
MONEYBEE QUEENBEE	AUG-07	-11.11%	-9.84%	-0.19%	21.61%	45.34%	29.49%	41.53%	16.76%	22.05%
GLOBE CAPITAL ARBITRAGE	JAN-08	-3.63%	-5.81%	-9.75%	0.23%	18.90%	15.57%	21.07%	16.10%	15.77%

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