

AIF & PMS EXPERTS INDIA

Process-driven returns



Exploring AIF & PMS universe

Preferred investment avenue of wealthy individuals



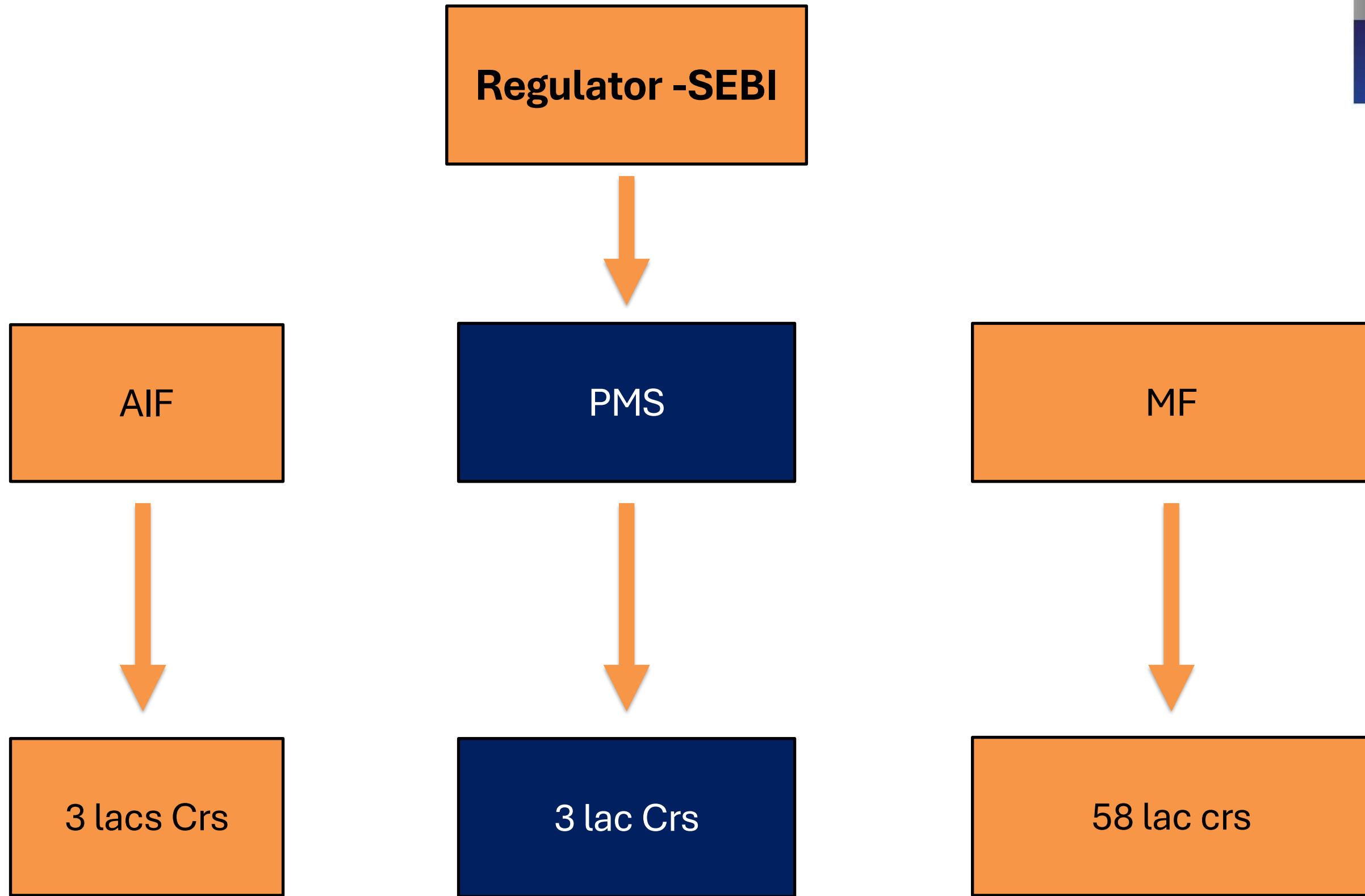
Alternative Investment Fund

AIFs are pooled investment funds that focus on alternative asset classes beyond traditional stocks and bonds, such as real estate, private equity, hedge funds, startups, and more.



Portfolio Management Service

PMS provides tailored investment portfolios comprising equity, fixed income instruments and individual securities.



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



- ❖ **Dynamic team led by experienced leadership.**
 - ❖ **Process-driven investment approach**
 - ❖ **Largest digital platform for AIFs**
 - ❖ **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**
-

USP OF AIF & PMS EXPERTS INDIA



- Distinguished AIF & PMS platform in India-Compete product bouquet with unbiased approach
- High Quality manager selections – All the deserving managers are on single platform (www.aifpms.com)
- Process Driven returns
- High performing portfolio
- NISM qualified wealth managers-Team of experts for high quality advice and services
- Domain Experts / Research based advice
- Tailor made solutions / Advice on when to book profits
- One on One with Fund Manager
- Family office solutions

PROBLEM STATEMENTS

Problem

❖ **Frequently Changing Relationship Manager**

Solution

Fixed Relationship Manager

Tired of repeating your investment goals? Enjoy seamless guidance with a dedicated relationship manager who truly understands you.

Problem

❖ **Limited Portfolio Manager Choices**

Solution

Availability of Multiple Deserving Portfolio Managers Under One Roof

Don't settle for limited options. Access a diverse pool of expert portfolio managers, ensuring your investment strategy is always optimized.

Problem

❖ **Biased Approach**

Solution

Data-Driven Unbiased Allocation

Say goodbye to biased recommendations. Benefit from data-driven decisions for optimal investment allocations.

PROBLEM STATEMENTS

Problem

- ❖ **Irregular Profit Booking**

Solution

- ❖ **Regular Profit Booking**

Tired of inconsistent returns? Our strategic profit booking ensures steady growth.

Problem

- ❖ **Inadequate Servicing /Updates**

Solution

- ❖ **Quarterly Portfolio Review**

Left in the dark about your portfolio's performance? We provide thorough portfolio reviews every quarter, keeping you informed and confident in your investments.

Problem

- ❖ **Lack of Market Insights'c**

Solution

- ❖ **Direct Fund Manager Interaction for Market Overview**

Missing out on crucial market trends? Engage directly with our fund managers for real-time market insights and strategies.

PROBLEM STATEMENTS

Problem

- ❖ **Limited Investment Opportunities**

Solution

- ❖ **Exclusive Opportunities in CAT I and CAT II Investments for Existing Clients**

Feeling restricted by your current options? Enjoy exclusive investment opportunities in CAT I and CAT II funds, specially curated for our valued clients.

Problem

- ❖ **Superficial Research**

Solution

In-Depth Institutional Research

Worried about shallow analyses? Benefit from our comprehensive institutional research, ensuring you make well-informed investment choices.

Problem

- ❖ **Generic Investment Plans**

Solution

Curated Portfolios to Match Your Investment Goals

Tired of one-size-fits-all solutions? Our portfolios are meticulously curated to align with your specific investment goals and risk appetite.

PROBLEM STATEMENTS

Problem

❖ **Superficial Research**

Solution

❖ **In-Depth Institutional Research**

Problem

❖ **Generic Investment Plans**

Solution

❖ **Curated Portfolios to Match Your Investment Goals**

Problem

❖ **Fragmented Portfolio Analysis**

Solution

❖ **Comprehensive 360 Portfolio Research**

Worried about shallow analyses? Benefit from our comprehensive institutional research, ensuring you make well-informed investment choices.

Tired of one-size-fits-all solutions? Our portfolios are meticulously curated to align with your specific investment goals and risk appetite.

Comprehensive 360 Portfolio Research Frustrated with incomplete portfolio reviews? We offer a holistic 360-degree analysis of your portfolio, ensuring all aspects of your investments are optimized.

	AIF	PMS	MF
Suitable	AIFs provide flexibility and diverse investment objectives, making them suitable for those open to longer lock-in periods and seeking a comprehensive investment approach	PMS is designed for those seeking personalized services and substantial returns, making it an ideal choice for discerning high-net-worth individuals.	MFs suit investors desiring risk reduction through pooled investments, prioritizing inclusivity over exclusivity in their approach.
Investment Objective	AIFs offer versatility, addressing various goals like high returns, capital preservation, or diversification	PMS aims at delivering high returns for HNIs and institutions.	MFs, meanwhile, focus on achieving long-term growth and income.
Investment Strategy	AIF managers adopt strategies aligned with the fund's objectives	Portfolio managers employ diverse strategies to cater to client's specific needs.	MF managers tailor their approaches to meet the investor's requirements.
Minimum Investment Strategy	Rs. 1 Crore	Rs. 50 lacs	Rs. 500 with monthly SIP
Fees	AIFs have a 2% management fee and a 20% profit-sharing model	PMS charges 1-3% management fees and profit-sharing fees	MFs follow SEBI-regulated expense ratios ranging from 1% to 2.25%
Liquidity	AIFs may have lock-in periods and limited liquidity options	PMS provides direct ownership with relatively less liquidity.	MFs offer high liquidity.

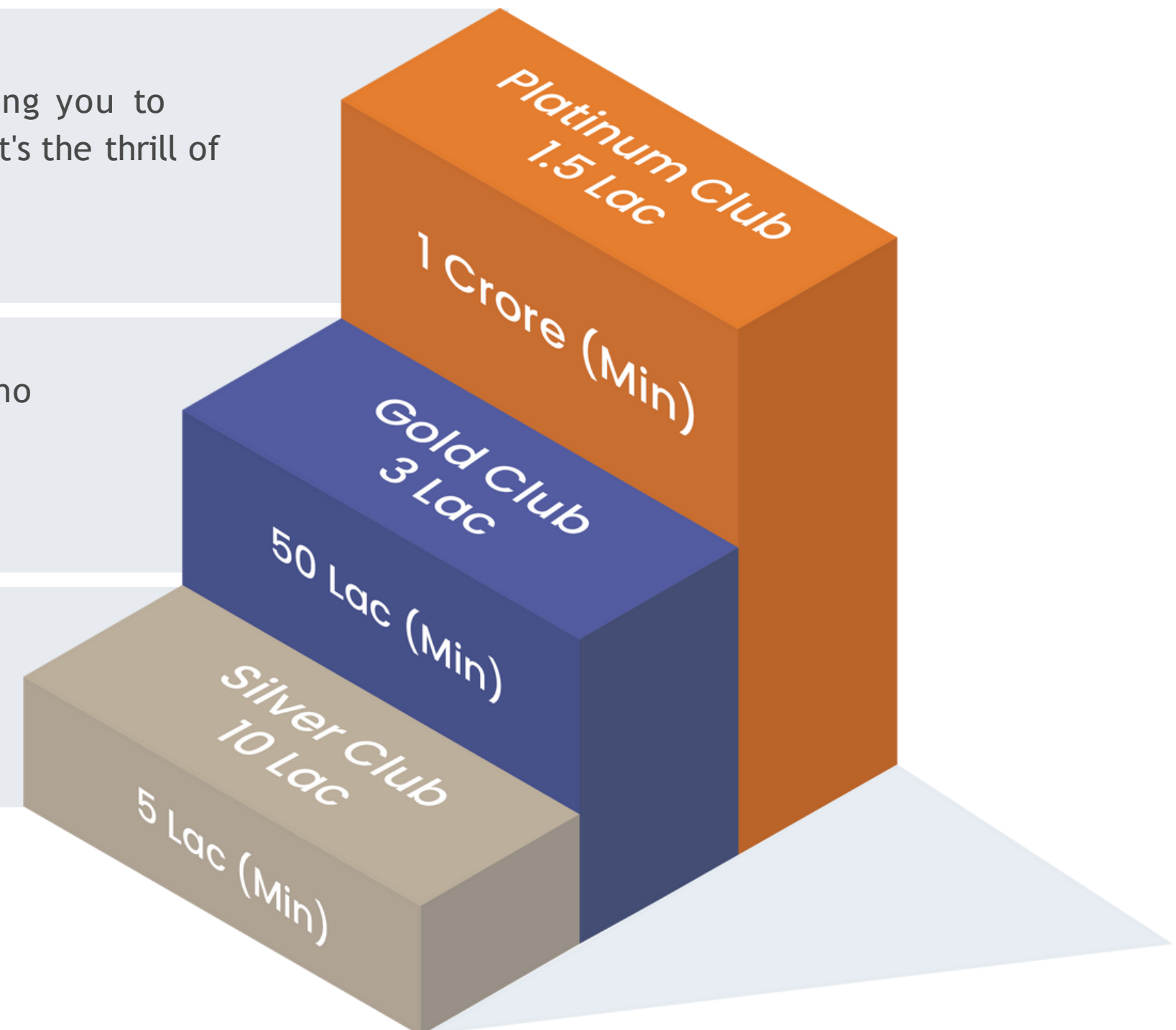
Join the Elite Club of AIFs and PMS

Why settle for the ordinary when you can be extraordinary?

AIFs offer an exhilarating off-road adventure, allowing you to explore uncharted terrain in the world of investments. It's the thrill of navigating beyond the conventional.

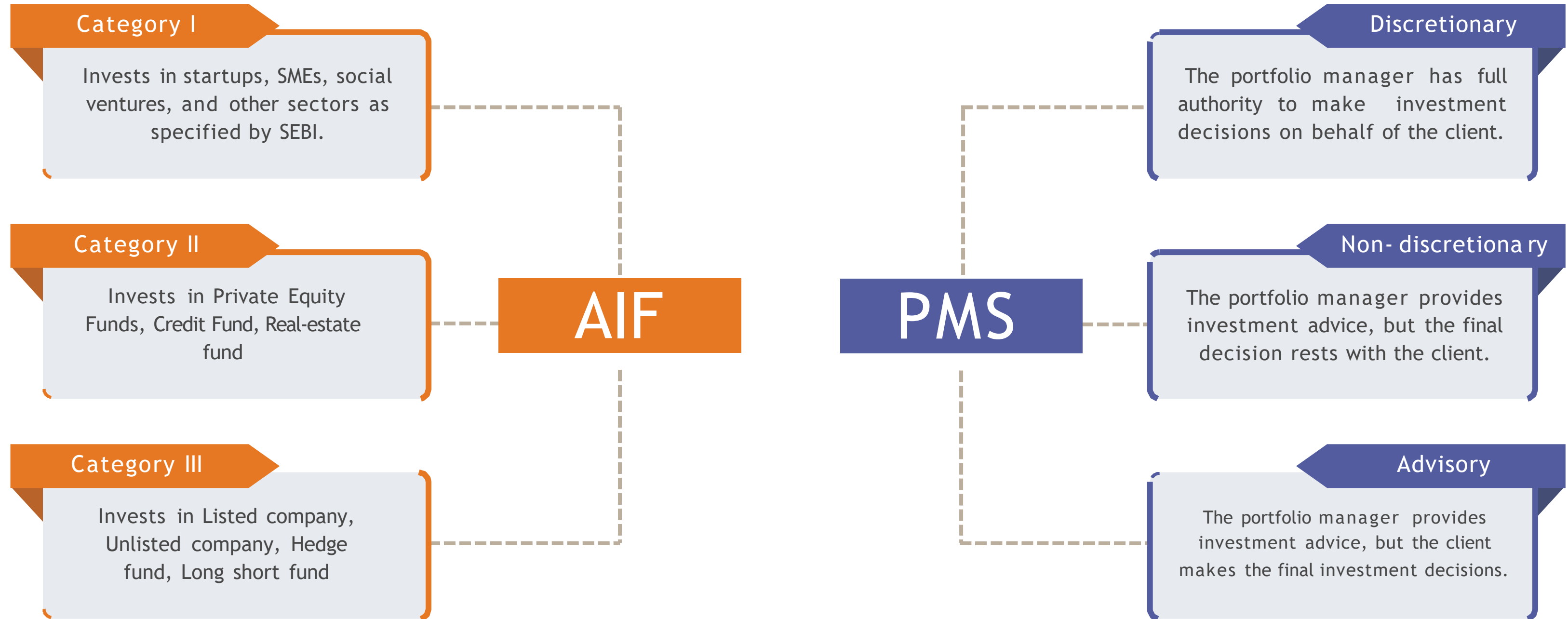
PMS is akin to having a luxury and personal chauffeur who tailors the entire investment journey just for you. It's the bespoke experience in wealth management.

Investing in Mutual Funds is like hopping on a bus. You're one of many passengers on a collective journey.



Types of AIF & PMS

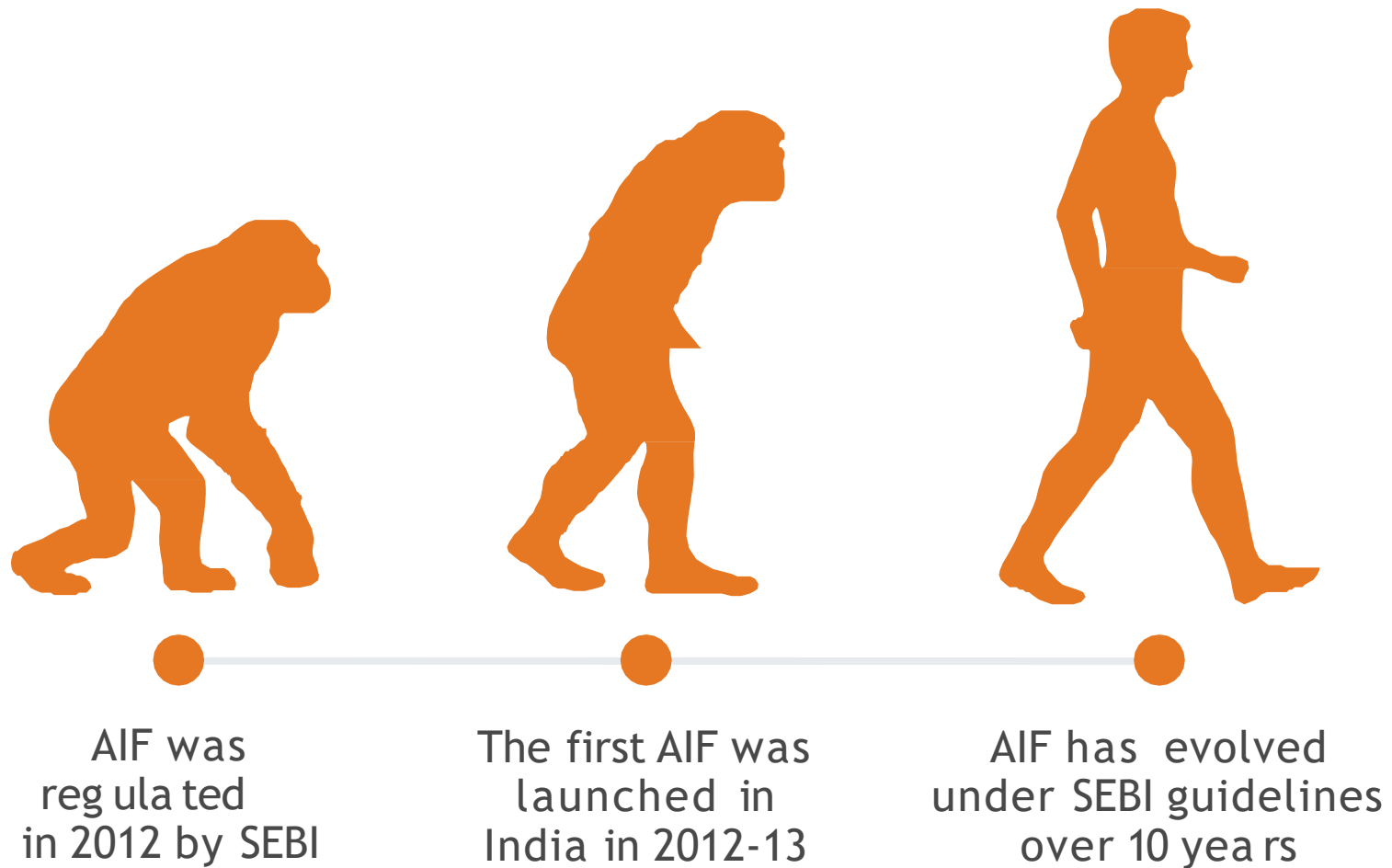
Exclusive investment opportunities tailored for elite investors



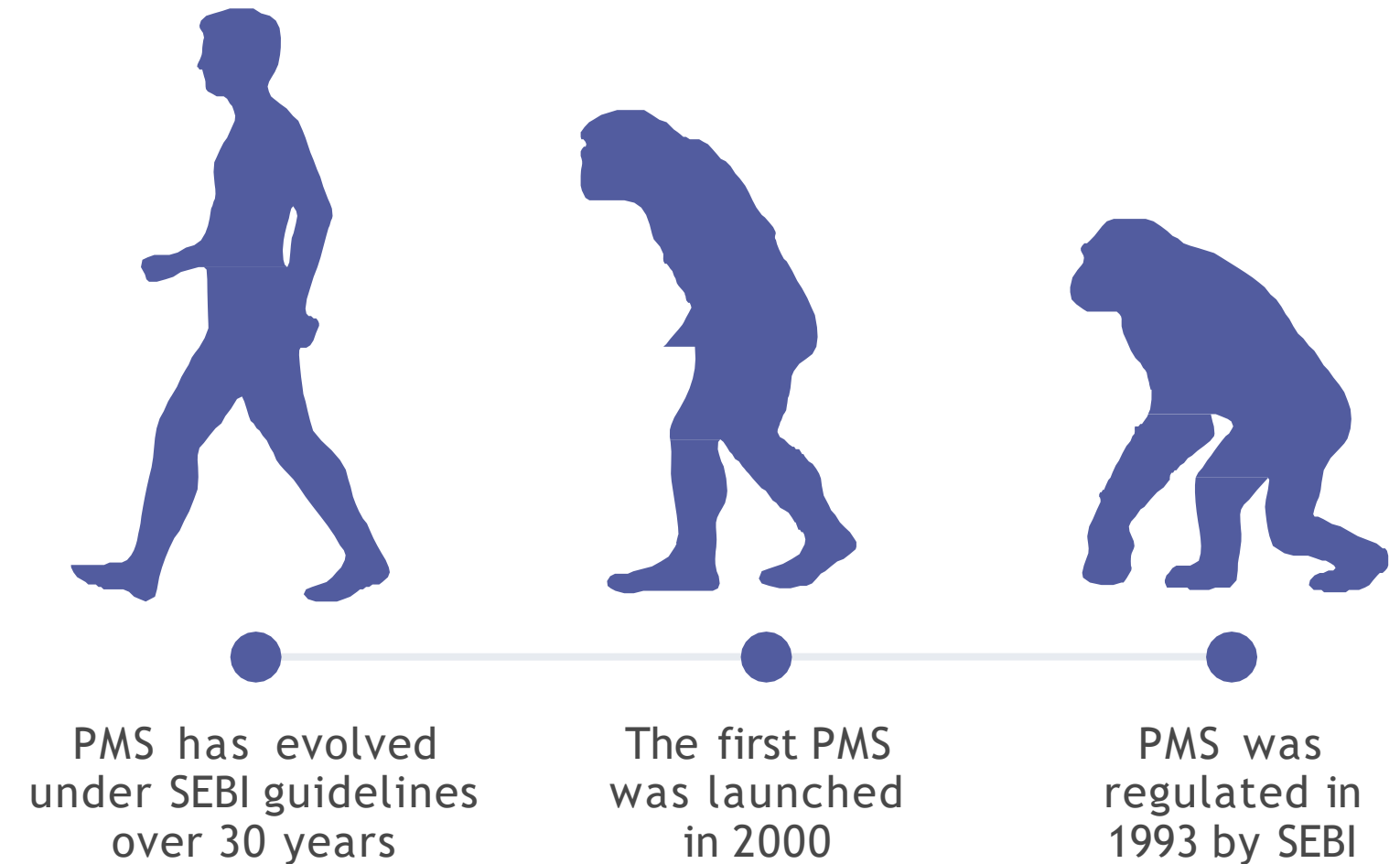
History of AIF and PMS

Evolution of AIF & PMS

AIF

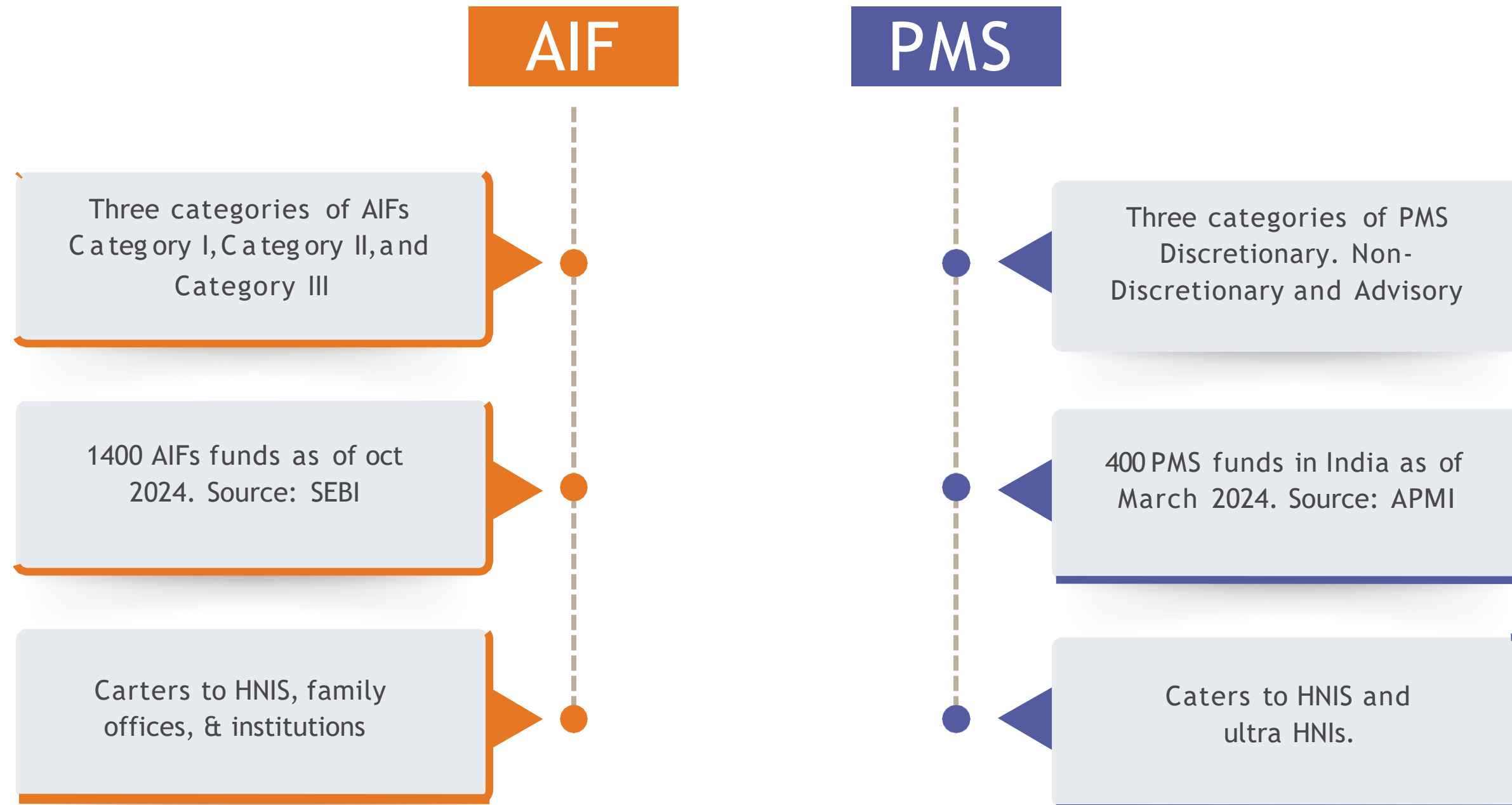


PMS



The Abundance of Funds in AIF and PMS

Shaping the financial journeys of affluent individuals



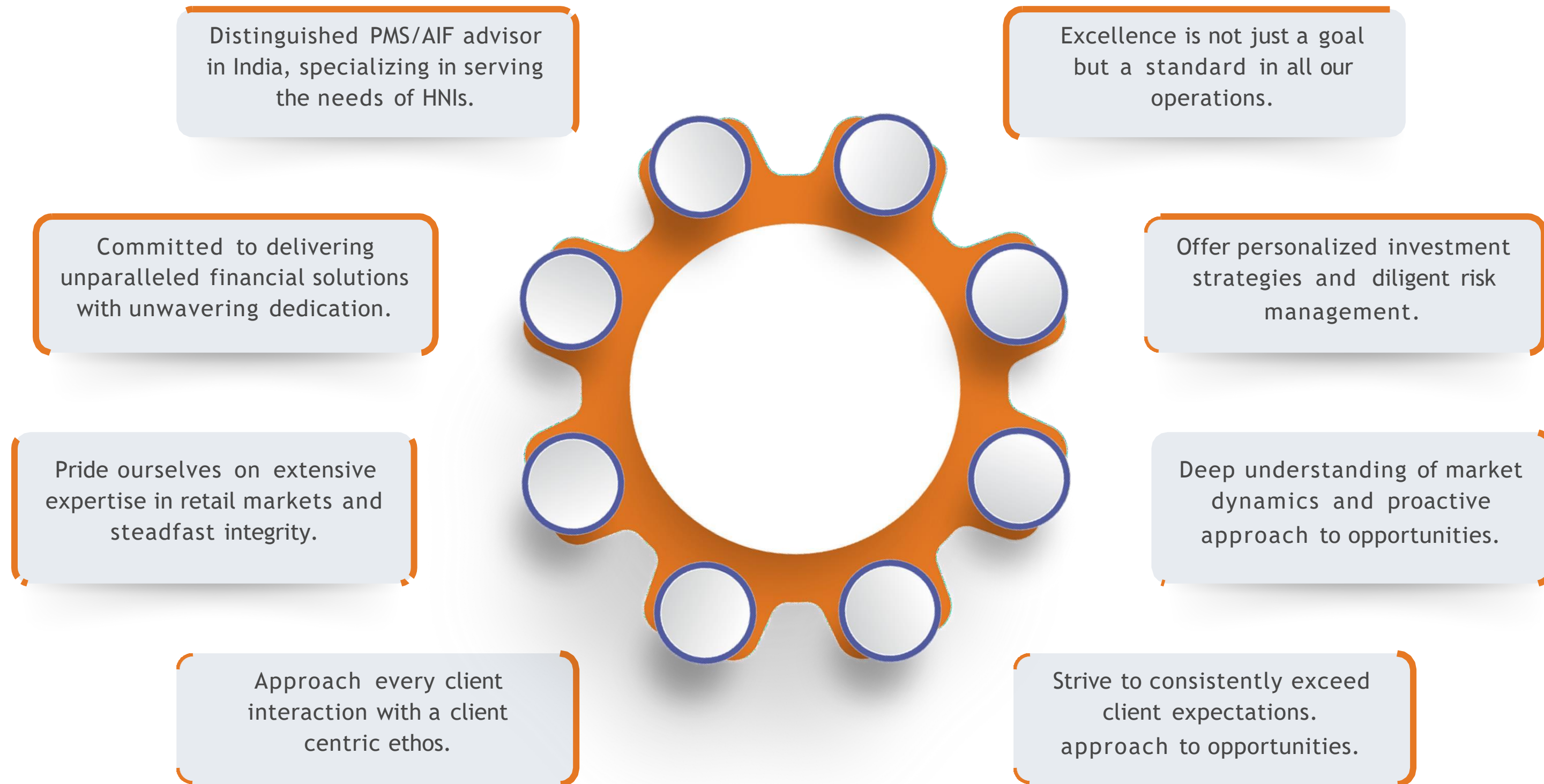
AIF & PMS EXPERTS INDIA

Process-driven wealth creation



We elevate financial horizons for elites

Empowering affluent with tailored solutions



Leverage our unparalleled investment capabilities

You entrust your wealth to seasoned professionals



Our investment prowess sets us apart in investment management, providing a unique advantage to our clients.



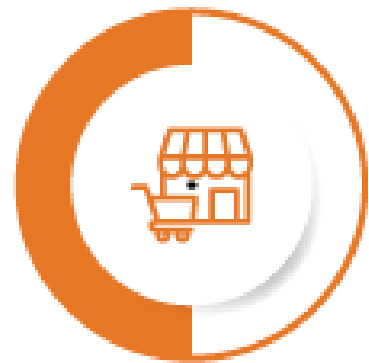
Access to diverse asset classes-equities, fixed income, and alternatives-offers our ultra HNI clients unparalleled opportunities for portfolio diversification and wealth preservation.



We excel in tailoring investment strategies to individual client needs, ensuring optimal alignment with their financial objectives.



Our seasoned team adeptly navigates dynamic market conditions, discerns emerging trends, and capitalizes on lucrative investment opportunities domestically.



With a comprehensive understanding of asset classes and market dynamics, we empower clients to make informed investment decisions.



Our commitment to excellence in investment management is evident in our pursuit of innovative strategies and rigorous risk management practices.

Why Choose AIF & PMS Experts?

A process-driven investment approach

Over 350
investors have
invested in our
process.



Over ₹500 crores
have been
invested using
our process.

Trusted by
investors
across 10
countries.



Over 15,000
investors use
our tools before
deciding to
invest.

Why we stand as the exclusive choice?

The panorama of benefits beyond returns



Investment Committee

Our seasoned veterans, who have weathered multiple capital market cycles, scrutinize every portfolio.



Rigorous Selection Process

We meticulously handpick investments aligned with your goals using our 31s selection approach



Guidance in Storms and Calms

We stand by you through market fluctuations, helping you stay focused on your objectives.



Personalised Portfolio

We craft your portfolio after understanding your risk appetite and financial aspirations.



Consistency Score

Our measurable consistency score delivers stability to your portfolio



Domain Expertise in AIF & PMS

Our highly qualified team, with over 16 years of capital market experience, steers your investments.

Strategic fund selection for portfolio optimization

Finding the right match for your financial goals

 **Process-Driven Approach**

Funds with well-defined strategies and adherence to their approach stand out

 **Fund Management Assessment**

We evaluate tenure, turnover, and their ability to weather market cycles

 **Aligned Investment Objectives**


Clear goals create a reliable investment roadmap

 **Strong Track Record**

Funds with a track record of weathering storms and delivering results earn our attention

 **Due Diligence of Fund Manager**

We dig deep into their history, ethics, and decision-making

 **Qualification of Fund Manager**

We evaluate qualifications, certifications and expertise

 **Investment Style**

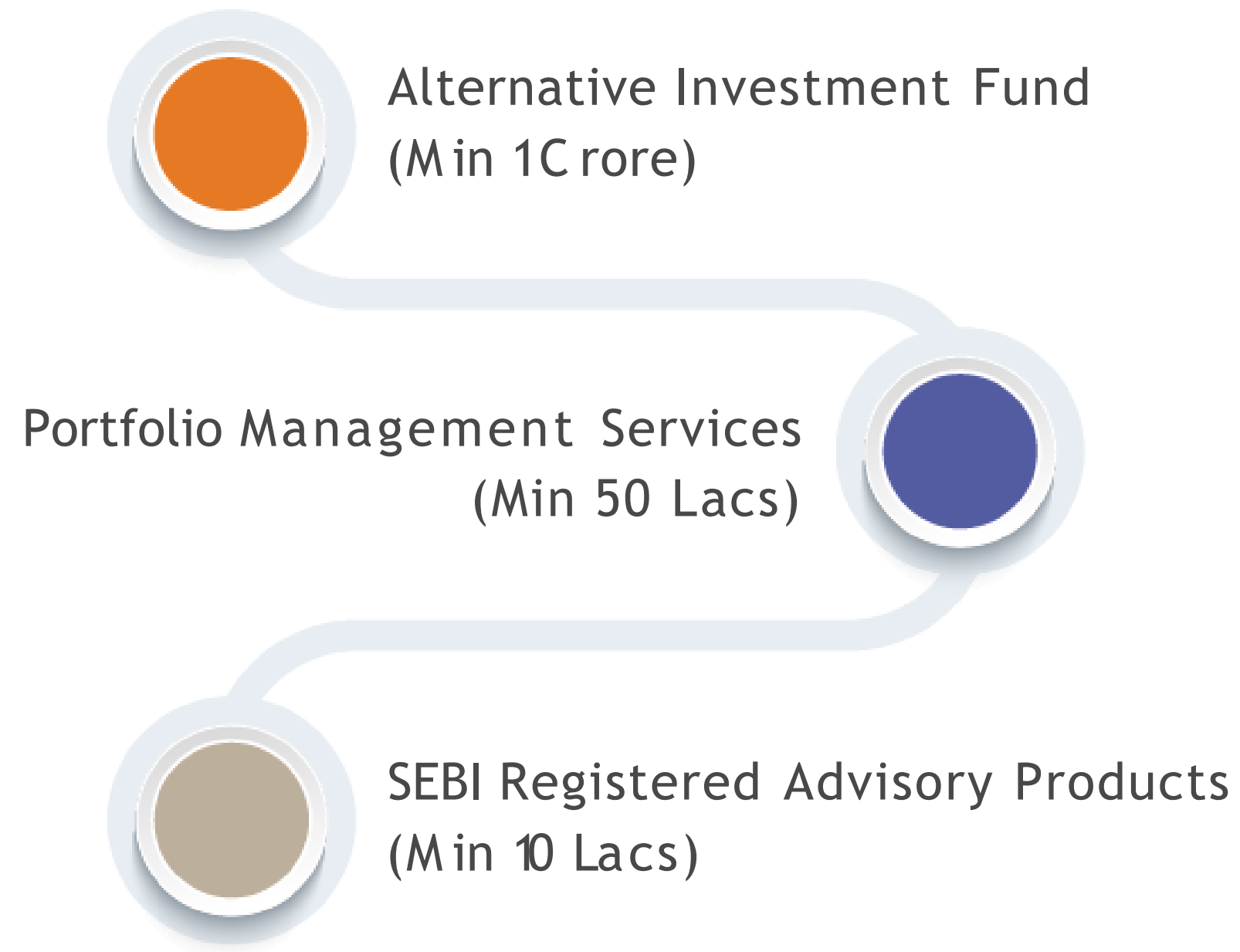
We match investment styles (value, growth, etc.) build portfolio on various frameworks

 **Investment Managers Pedigree and DNA**

We scrutinize the manager's background, philosophy and alignment with investor interests

Diverse investment avenues tailored for you

Divided by category, united by our investing process



Media Interactions



economictimes.indiatimes.com/aifpms_conclave.cms

Overview Partners Speakers Schedule What To Expect Who Should Attend Why Join Us

ET Markets | AIF & PMS EXPERTS INDIA PROCESS-DRIVEN RETURNS

Present

INDIA'S LARGEST SUMMIT ON
ALTERNATE INVESTING AND PORTFOLIO MANAGEMENT SERVICES

AIF & PMS Conclave 2.0

The Golden Decade for India

भारत का अमृत काल

19th & 20th June 2024 | 11-6 PM

Media Interactions



Featured on Zee Business

Featured on News Channel



Featured on Zee Business



[Equity Market Outlook And Opportunity](#)

Featured on YouTube



[Make Strategic Investments](#)

Process-driven returns

A proven process for consistency



Process-driven wealth creation

We meticulously follow our investing process

Investment Style

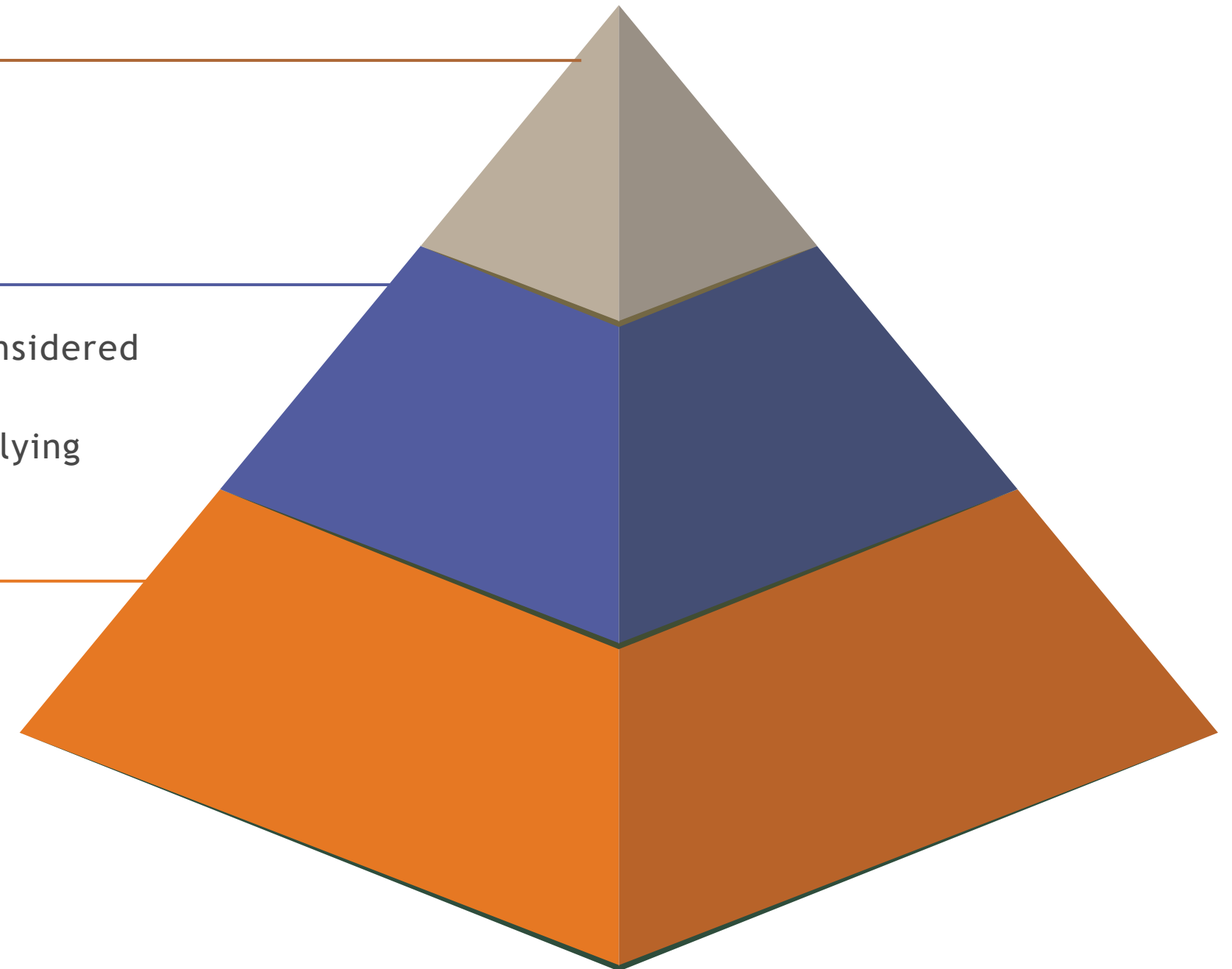
Clear, adaptable strategies aligned with investor goals, crucial for navigating market fluctuations and capitalizing on opportunities.

Investment Quality

Focusing on the intrinsic value and fundamentals of the assets being considered for investment. Exploring the qualitative aspects such as management competence, competitive advantage, and financial health of the underlying companies or assets.

Investment Performance

Emphasizing consistent, risk-adjusted returns and effective draw down management to achieve long-term growth while preserving capital.



The imperative of an investing process

A compass for systematic wealth creation

Guidance Amidst Uncertainty

An investment process acts as your compass especially during uncertain times.

Avoiding Emotional Pitfalls

A well-defined process helps you stay rational, preventing knee-jerk reactions based on fear or greed.

Consistency in Decision-Making

An investment process ensures you make informed choices consistently, regardless of market noise.

Customization to Your Goals

An investment process tailors strategies to your unique financial objectives, whether it's retirement, or wealth accumulation.

Risk Management

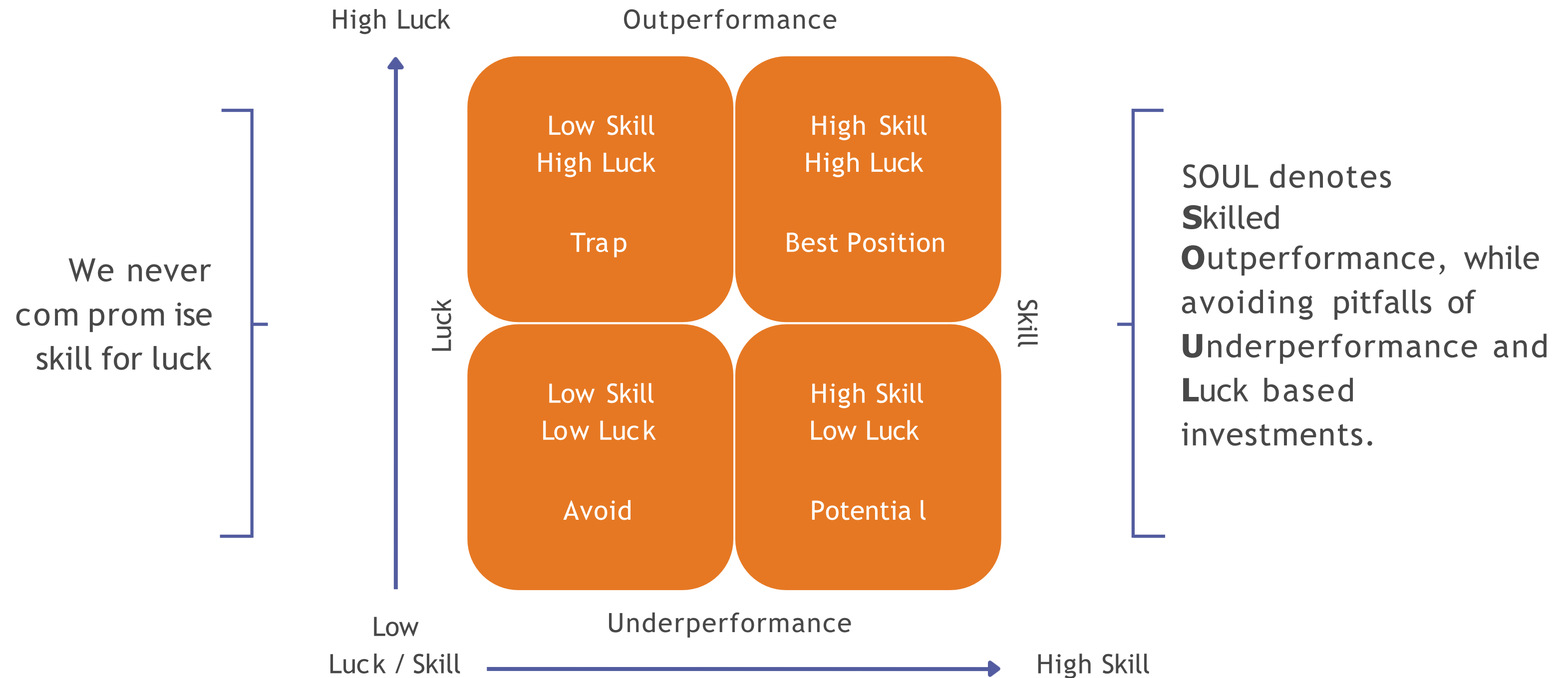
Like a safety net, a process assesses and manages risks. It helps you strike a balance between growth and protection.

Long - Term Perspective

An investment process ensures you make informed choices consistently, regardless of market noise.



The soul of our fund selection philosophy is SOUL



Skill and luck jointly shape alpha

We never compromise skill for luck

Skill

- Key attribute for generating consistent alpha
- Drives successful investment outcomes

Skilful Investments

- Provide better risk-adjusted returns historically
- Indicate promising future outcomes

Luck

- Not always reliable
- Investments based solely on luck lack consistency and sustainability

Fund Selection Process

- Emphasizes funds with proven returns from robust investment processes by Portfolio Managers

Analyzing Fund Allocation

- Considers the balance between luck and skill in our investors' fund allocations



Fund selection process

Our rigorous fund manager selection process ensures that you have the best fund managers In your portfolio



Emphasis on the risk management process of the 4 portfolio manager.



Qualitative measures like the management quality, 5 fund manager's profile, retention rate etc.



Evaluation of alpha on the basis of market style and 3 active share.



Check for the consistency of fund's alpha over the 1 benchmark for longer periods; typically 5+ years.



Analyse if the alpha is in sync with the risks taken by 2 the portfolio manager.

Validations of our unique investing process



Avinash Bhandari

Founder and Managing Partner
Think North Management Consultants

Testimonial from our investor

Before discovering AIF & PMS Experts India and meeting Vikas, I had consulted with numerous prominent wealth managers, yet none could tailor a portfolio to match my unique needs. Frustrated by the lack of suitable solutions from leading wealth management firms, I was skeptical about finding the right fit.

However, upon meeting Vikas, I was impressed by his meticulous approach. He took the time to thoroughly profile me from various angles, ensuring a deep understanding of my financial objectives. Utilizing his innovative investing process, Vikas crafted a personalized portfolio tailored to my specific requirements. Despite having to forego some trending funds that didn't align with his investing philosophy, Vikas's commitment to my long-term financial success was evident from the start.

5 years later, I am still with AIF & PMS Experts India, entrusting them with my entire investment portfolio. Vikas and his team have consistently demonstrated their unwavering support, guiding me through both prosperous and challenging times. Thanks to their expertise and dedication, I have been able to stay focused on my financial goals, tuning out the distractions of short-term market fluctuations. My journey with AIF & PMS Experts India has been nothing short of transformative, and I am grateful for their continued partnership.

Validations of our unique investing process



Bipinchandra Dugam

Senior Drilling & Completions Manager

Testimonial from our investor

I used to distribute my investments among various wealth managers, resulting in a fragmented and challenging tracking process. The frequent turnover of relationship managers (RMs) added to the instability, while unwanted fund sales and excessive portfolio churn led to subpar performance. Poor client service further eroded my confidence, leaving me feeling adrift and unsupported in my financial journey.

However, upon meeting Vikas, my investment experience underwent a remarkable transformation. He not only guided me through the process of portfolio construction but has continued to provide unwavering support ever since. Consolidating my investments under his stewardship, Vikas ensured a stable relationship by retaining my RM, fostering a bond that transcended mere investment transactions.

AIF & PMS Experts demonstrated a commitment to my financial well-being by conducting periodic portfolio reviews and making adjustments only when aligned with my goals and their investing process. This approach eliminated the need for frequent churn, resulting in improved portfolio performance.

Over the past nine years, my journey with AIF & PMS Experts has been nothing short of delightful. I commend Vikas and his team for their dedication and wish them continued success.

Process-oriented portfolios

Unbiased and customized portfolios



Funds that undergo rigorous scrutiny

We only recommend funds aligned with our 31 criteria



Fund selection at our firm is more than a process; it's an art dedicated to maximizing returns and minimizing risks.

Our methodical approach integrates rigorous research, competitive analysis, and a forward-thinking investment philosophy.



We employ a comprehensive methodology, including thorough due diligence, quantitative and qualitative assessments, performance evaluations and continuous monitoring of fund managers and strategies.

Our commitment to excellence in fund selection is evident in our dedication to staying abreast of market trends and adapting strategies accordingly.



Each fund undergoes meticulous scrutiny to ensure alignment with clients' objectives and our high performance standards.

We optimize investment outcomes by combining empirical data with astute judgment, resulting in a robust and dynamic fund selection process.



Awards and recognitions

Our commitment to excellence has been honoured with prestigious awards and accolades.



Our trusted investment partners

Curated through our rigorous investing process



Process-driven product selection

Curated through our rigorous investing process

AIF Products

Helios Long Short Fund

Motilal Oswal Real Estate

Pantomath

Piper Serica Angel Fund - Cat 1

Step Trade

Vivtri Private Equity

PMS Products

Abakkus Emerging Opportunity Fund

Carnelian Shift Strategy

Green Lantern Capital Alpha

ICICI Contra & Pipe

Motilal Oswal Mid To Mega

Nine Rivers Capital - Aurum Small Cap

Process-driven performance: AIF

Product Name	1 yr (%)	3yr (%)	5yr (%)	Inception
Abakkus Emerging Opportunity Fund	58.70	34.80	NA	37.60
Helios Long Short Fund	37.99	NA	NA	20.95
Prudent Equity Ace Fund	100.35	NA	NA	74.53
ITI Long Short Equity Fund	27.34	48.11	97.87	14.67
Ace Lansdowne India Equity	30.50	16.70	NA	22.30

Data as on :29/02/2024

Disc: Past returns may not guarantee future returns

Process-driven performance: PMS

Product Name	1 yr (%)	3yr (%)	5yr (%)	Inception
Green Lantern - GL Alpha Fund	85.13	37.51	NA	41.08
ICICI Prudential PMS Contra Strategy	52.80	28.40	24.30	21.90
Carnelian Shift Strategy	71.70	40.20	NA	45.90
Abakkus Emerging Opp Approach	55.30	NA	NA	38.10
Motilal Oswal Mid To Mega Strategy	67.90	20.20	NA	27.90

Data as on :29/02/2024

Disc: Past returns may not guarantee future returns

Integrated financial solutions

Solutions extending beyond investments



Family Office

We offer personalized financial management, ensuring the preservation and growth of your family's wealth for current and future generations.



Estate Planning

We work closely with you to create a comprehensive plan that safeguards your assets, minimizes tax implications, and ensures a smooth transition for your loved ones.



Trust Formation

We guide you through the intricacies of trust creation, providing a secure framework for wealth transfer while aligning with your values and aspirations.



Taxation Consultancy

Through our empaneled Chartered accountant, we devise tailored strategies for optimal tax management.

Process-oriented team

We live by our process



About the Founder



Vikas Agrawal | Founder & CEO

Mr. Vikas Agrawal is a Founder and CEO of AIF & PMS Experts India.

He is a MBA graduate with specialization in finance. He has also pursued the various investment courses from Flame University Pune. With over two decades of expertise in the Asset & Wealth Management Industry. Mr. Vikas Agrawal India's most trusted voice on Investments in Alternative investment fund & Portfolio Management Services. Mr. Vikas Frequently appears on Zee Business, ET Market, and ET Now Channels to offer his perspectives on capital markets. Additionally, he has attended Berkshire Hathaway AGM's where he had the opportunity to meet Warren Buffet and Charlie Munger in person. Vikas consistently share his learnings from these experiences with his investors.

Solutions extending beyond investments

The guardians of our investing process



Samir Kumar | Chief Business Officer

Mr. Samir Kumar is a seasoned professional with over 20 years of extensive experience in the share market and currently serves as the Chief Business Officer (CBO) at AIF & PMS. Holding an MBA in Marketing & HR and a Professional Trader Certification from the prestigious Online Trading Academy (OTA), he possesses in-depth knowledge of financial markets and trading strategies. Specializing in driving business growth, optimizing revenue streams, and developing client-centric strategies for high-net-worth individuals (HNIs) and ultra-HNIs, Mr. Kumar focuses on key investment offerings such as Mutual Funds, Portfolio Management Services (PMS), Alternative Investment Funds (AIF), and Gift City accounts. He is a proven leader with a strong focus on leading high-performance sales teams, fostering collaboration, and aligning organizational goals with evolving market trends to ensure sustainable growth and profitability.

Solutions extending beyond investments

The guardians of our investing process



Devanshu Bindlish

VP - Advisory

Devanshu, as the founding member of AIF & PMS Experts, has spent the past six years honing a comprehensive financial acumen crucial for fostering and managing client relationships. His services not only retain our investors but also attract new ones.



Vijay Chilka

VP - Advisory

Vijay Chilka (AVP) holding an MBA in finance with 20 years of experience in Investment and Wealth Business with Expertise in B2B and B2C in growing the Business with client centric approach. With Expertise in business strategy, process-driven sales, Public Speaking and distribution business.

Guiding your investments with expertise

The advocates of our investing process



Avadhoot Shinde

AVP - Research & Development

Commerce graduate from Mumbai university, total 18 yrs experience in Retail banking and Wealth Management. Portfolio Optimization and investment consultant. Process excellent organizational, Relationship Management & Analytical Skills.



Chandan Sinha

AVP - Research & Development

Cluster Head - AVP at AIF & PMS Experts India Pvt Ltd. With over 16 years of experience in wealth management and investment strategies, he has held key roles at top firms like Religare, IIFL, Anand Rathi, and Geojit. Chandan is known for his expertise in client advisory and financial solutions.



Sinoob Biswas

AVP - Advisory

An accomplished Finance professional with an MBA and over 14 years of experience in wealth and capital market. I had the privilege of serving in pivotal roles at prestigious firms such as Kotak Securities, Motilal Oswal securities & Standard Chartered Securities.



Mukund Walunj

Sr. Manager - Research & Development

Mukund Sudam Walunj, Having 16 Years Experience in Institutional Equities. Worked With Wallfort Financial Services Ltd as a Institutional Backoffice Head & Asit C Mehta Intermediaries Ltd & IIFL

Gallery

We live by our process





Let's embark on a journey to create wealth

We live by our process!

Follow us :



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