

PMS Performance

— **April 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.

April 2025



Rebound and Resilience: Navigating the Path to Long-Term Growth

Dear Valuable Investors,

At the outset, let me take this opportunity to wish you a very happy and prosperous financial year 2025-26. At AIF PMS Experts, we value your patronage and trust in your journey of wealth creation.

March 2025 marked a significant turnaround for Indian equities, breaking a five-month losing streak with notable gains. The BSE Sensex rose by 5.8%, and the Nifty 50 advanced over 6.3%. This recovery was largely driven by Foreign Portfolio Investors (FPIs) injecting \$3.05 billion into Indian equities during the latter half of the month, with approximately ₹175.85 billion directed towards the financial sector. Consequently, the Nifty Financial Services Index experienced a 9% surge, its best monthly performance since July 2022.

Despite this positive momentum, the fiscal year concluded with net FPI outflows totaling \$14.6 billion, the second-highest annual outflow on record. This underscores the ongoing challenges posed by global uncertainties and market volatility.

Impact of U.S. Tariffs on Indian Exports

The recent 26% U.S. tariff on Indian imports presents both challenges and opportunities for India's economy. While sectors like gems and jewellery may face increased costs, industries such as textiles and apparel could become more competitive compared to other Asian exporters facing higher tariffs. This shift offers India a chance to enhance its position in these markets. Additionally, the Reserve Bank of India is considering interest rate adjustments to support economic stability and growth. Investors might find new opportunities in sectors poised to benefit from these changing trade dynamics.

Embracing Resilience Amid Market Volatility

Investing in equities inherently involves navigating periods of uncertainty and making challenging decisions. Market corrections and fluctuations are natural occurrences, and resilience becomes crucial during these times. Resilience, in this context, refers to the ability to adapt to market adversities, maintain focus on long-term objectives, and avoid reactive decisions based on short-term market movements.

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For instance, during the market downturns of 2020, investors who remained steadfast and adhered to their long-term strategies often witnessed substantial recoveries as markets rebounded. This highlights the importance of staying committed to well-considered investment plans, even amidst temporary market setbacks.

Balancing Immediate Opportunities with Long-Term Goals

Investors frequently face the dilemma of pursuing short-term gains versus focusing on long-term growth. While emerging sectors or rapidly growing companies may offer quick returns, they often come with increased volatility and risk. Conversely, established companies with strong fundamentals may provide more stable, albeit gradual, growth.

Aligning investment choices with individual financial goals, risk tolerance, and investment horizons is essential. Prioritizing long-term growth and stability can lead to more consistent and sustainable returns over time

Turning Market Challenges into Investment Opportunities

Market downturns, while challenging, can present opportunities to acquire quality assets at attractive valuations. By conducting thorough analyses and focusing on companies with solid fundamentals and resilient business models, investors can position themselves to benefit from potential market recoveries.

The Strategy - Commitment to Long-Term Investment Strategies

The recent market rebound serves as a reminder of the dynamic nature of equity investing. Maintaining resilience, exercising patience, and adhering to a disciplined investment approach are vital for navigating market fluctuations. At AIF PMS Experts, we remain dedicated to guiding our clients through these complexities, emphasizing strategies that focus on long-term wealth creation and financial well-being.

Thanks & Regards

Vikas Agrawal

Founder & CEO

AIF & PMS Experts

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LARGE CAP

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI
AccuraCap Alpha10	Sept-11	7.70%	-6.20%	-14.00%	-3.00%	14.60%	8.40%	16.20%	10.50%	13.40%
ACE15	Dec-17	5.43%	-5.22%	-11.89%	1.00%	25.84%	17.35%	26.16%	NA	12.41%
Alchemy Alpha100	Aug-23	7.2%	-6.3%	-20.1%	-3.9%	NA	NA	NA	NA	12.1%
Aditya Birla Top 200 Core Equity Portfolio	May-15	6.88%	-4.94%	-13.42%	5.18%	19.29%	12.78%	23.41%	NA	12.68%
Ambit- Coffee Can	Mar-17	7.1%	-2.3%	-8.9%	9.4%	17.9%	10.4%	16.6%	NA	15.9%
Ambit Global Private Client - Caliber	Apr-21	7.30%	-7.30%	-13.40%	5.10%	23.00%	8.30%	NA	NA	15.10%
Capital mind - Market Trend	Mar-19	7.51%	-5.15%	-9.16%	9.42%	25.40%	14.06%	22.76%	NA	15.85%
ICICI Prudential PMS Largecap Strategy	Mar-09	9.50%	-1.61%	-11.42%	8.45%	28.53%	19.05%	30.86%	13.90%	16.36%
Marcellus King of Capital	Jul-20	6.09%	6.16%	-2.55%	20.02%	19.55%	8.63%	NA	NA	11.68%
Marcellus Consistent Compounders	Dec-18	6.82%	-3.21%	-14.31%	3.49%	13.15%	4.40%	14.42%	NA	13.39%
Narnolia Financial Services - Large Cap	Mar-12	8.00%	-4.60%	-4.76%	13.98%	23.21%	13.24%	22.41%	13.58%	16.45%
KarmaCapital Magnolia	Feb-23	5.9%	-2.7%	-9.7%	4.4%	18.6%	NA	NA	NA	16.5%
Right Horizons- India Business Leader	Nov-12	7.91%	-10.39%	-15.14%	2.28%	20.70%	11.20%	23.60%	10.22%	10.92%
Renaissance Opportunities Portfolio	Jan-18	6.77%	-5.90%	-8.25%	9.88%	23.18%	16.36%	30.42%	NA	13.41%
Tulsian PMS	Apr-20	13.80%	-7.22%	-20.30%	-4.46%	28.42%	18.67%	37.10%	NA	ND

MID CAP

AMC & SCHEME NAME	INC DATE	STRATEGY PERFORMANCE								
		1M	3M	6	1Y	2Y	3Y	5Y	10Y	SI
Abans Smart Beta Portfolio	Apr-19	1.19%	-24.60%	-28.67%	-11.15%	16.35%	9.25%	20.79%	NA	13.39%
ACEMid cap	Dec-17	6.59%	-11.07%	-19.32%	1.92%	41.61%	29.24%	33.52%	NA	17.95%
Ambit- Good& Clean	Mar-15	4.5%	-12.0%	-17.3%	10.7%	23.4%	12.3%	23.8%	14.0%	13.9%
NAFA Assets Manager Pvt Ltd- Clean Tech Portfolio	Sep-21	4.42%	-23.28%	-24.04%	1.13%	27.50%	18.34%	NA	NA	22.45%
NAFA EMERGING BLUCHIPPORFOLIO	Jan-16	3.78%	-15.50%	-21.60%	6.04%	23.89%	13.92%	34.09%	NA	15.54%
NuvamaEquitese eXpansion Target (NEXT)	Jul-23	6.9%	-16.0%	-19.3%	7.3%	NA	NA	NA	NA	15.7%
Phillip Emerging India Portfolio (PEIP)	Aug-17	5.37%	-11.27%	-14.48%	1.49%	18.31%	10.83%	22.49%	NA	12.43%
Renaissance Midcap Portfolio	Jan-18	9.52%	-10.19%	-18.34%	2.72%	23.64%	17.29%	32.08%	NA	12.39%
Right Horizons Super Value Fund	Nov-12	5.45%	-18.35%	-18.80%	12.10%	25.80%	16.61%	32.11%	14.37%	15.73%
Sundaram S.E.L.F Portfolio	Jun-10	6.8%	-11.5%	-11.1%	6.3%	21.8%	8.5%	25.4%	12.8%	16.6%

DEBT

AMC & SCHEME NAME	INC. DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Neo Yield Enhancer	JAN-24	1.06%	3.04%	5.79%	11.06%	NA	NA	NA	NA	11.52%
Nuvama Absolute Return Strategy(NARS)	Jun-23	2.7%	1.4%	1.1%	9.1%	NA	NA	NA	NA	11.2%
Pace Financially Investment Adviser Pvt Ltd- Tresor secure	Jan-21	1.59%	2.28%	4.09%	15.13%	13.32%	11.57%	NA	NA	10.08%
Karvy Capital - Excel	Nov-16	1.09%	2.78%	5.50%	11.17%	11.53%	11.30%	11.21%	NA	10.65%
Northern arc - Income Builder Series B	SEP-22	1.30%	1.85%	4.67%	10.09%	10.20%	NA	NA	NA	10.92%
Profusion Income Enhancer	MAY-21	0.86%	2.57%	3.21%	7.11%	9.76%	9.05%	NA	NA	9.41%
Northern arc Credit Opportunity Strategy	FEB-24	0.89%	2.25%	4.08%	10.74%	NA	NA	NA	NA	11.01%
Karvy Capital - Demeter	JUL-14	0.68%	1.63%	3.68%	7.66%	7.22%	7.29%	9.04%	11.11%	11.48%

SMALL CAP

AMC & SCHEME NAME	INC. DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1	2 Y	3 Y	5 Y	10 Y	SI
Accuracap Dynamo	Dec-16	8.30%	-12.20%	-13.50%	21.70%	44.00%	28.50%	42.30%	NA	24.20%
Alchemy Alpha Small Cap	Dec-23	8.7%	-13.9%	-14.2%	13.3%	NA	NA	NA	NA	17.2%
Alchemy Smart Alpha Small and Micro cap	Dec-23	6.9%	-22.7%	-21.4%	0.3%	NA	NA	NA	NA	4.7%
Ambit -Emerging Giants	Dec-17	-2.1%	-25.0%	-27.5%	-10.5%	-0.1%	2.2%	21.1%	NA	10.5%
Counter Cycle Diversified Long Term Value	JUL-19	0.69%	-17.03%	-13.81%	23.06%	37.48%	30.78%	78.20%	NA	53.27%
EQUITREE EMERGING OPPORTUNITIES	Mar-17	5.71%	-13.45%	-7.69%	38.26%	61.88%	36.79%	51.76%	NA	8.17%
Equirus Long Horizon Fund	Oct-16	7.54%	-17.95%	-22.36%	0.59%	24.84%	10.09%	35.45%	NA	20.16%
Hem Securities - India Rising SME Stars	FEB-22	-1.54%	-25.86%	-25.62%	9.95%	26.42%	29.00%	NA	NA	27.47%
NAFA SMALLCAP PORTFOLIO	Mar-19	3.83%	-12.70%	-17.83%	6.56%	18.71%	12.35%	31.58%	NA	18.54%
NINE RIVERS AURUM SMALLCAP OPPORTUNITIES	Dec-12	3.90%	-19.50%	-21.10%	-4.00%	24.60%	14.40%	41.90%	16.10%	25.69%
Right Horizons Super-Value Aggressive Fund	Mar-23	4.71%	-22.22%	-18.24%	13.44%	NA	NA	NA	NA	29.16%
Sundaram Rising Stars Portfolio	Nov-09	4.7%	-13.02%	-12.3%	-1.8%	10.04%	4.3%	23.9%	8.4%	13.1%
SageOne Small & Micro cap Portfolio	Apr-19	6.80%	-15.60%	-19.10%	1.30%	17.60%	7.60%	32.90%	NA	22.80%

LARGE & MID CAP

AMC & SCHEME NAME	INC DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
Alchemy Smart Alpha 250	Aug-23	6.9%	-17.5%	-18.2%	3.3%	NA	NA	NA	NA	19.0%
Bonanza Growth	Apr-10	5.83%	-7.84%	-11.23%	1.01%	17.47%	10.89%	21.91%	14.85%	17.08%
GREEN LANTERN ALPHA FUND	Feb-20	6.20%	-4.1%	-10.6%	12.9%	43.5%	32.7%	41.9%	NA	34.14%
Ladderup Proud PMS	May-23	6.64%	-10.63%	-12.02%	4.4%	NA	NA	NA	NA	11.83%
Sage One Large and Midcap Portfolio	Apr-22	7.6%	-4.1%	-12.0%	14.9%	32.5%	19.2%	NA	NA	19.2%
Samvitti Capital PMS Long term growth	Nov-15	9.57%	-6.61%	-9.99%	-1.19%	17.78%	13.92%	21.33%	NA	15.42%
Valcreate IME Micro trends	Feb-23	5.26%	-8.82%	-14.92%	4.48%	22.59%	NA	NA	NA	20.64%
Wave Assets Private Limited - Bloom	MAY-24	3.79%	10.37%	9.66%	NA	NA	NA	NA	NA	27.26%

SMALL & MID CAP

AMC & SCHEME NAME	INC DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
AAA Budding Beasts	Jan-21	7.25%	-11.93%	-15.90%	16.38%	29.82%	22.12%	NA	NA	26.12%
Ambit TenX	Dec-21	2.8%	-17.1%	-23.2%	-2.7%	12.0%	8.1%	NA	NA	6.4%
Axis AMC Emerging Star Portfolio	Apr-24	6.68%	-12.16%	-12.55%	NA	NA	NA	NA	NA	-5.06%
Accura Cap PICOPOWER	Oct-11	10.10%	-16.90%	-17.10%	6.30%	29.40%	15.00%	36.40%	16.40%	22.50%
Aditya Birla Select Sector Portfolio	Oct-09	7.36%	-10.05%	-7.31%	19.73%	32.82%	23.84%	34.87%	15.06%	16.91%
ASK Emerging Opportunites Portfolio	Aug-17	12.91%	-8.34%	-13.36%	4.90%	18.25%	8.38%	20.19%	NA	11.27%
Abakkus Emerging Opp Approach	Aug-20	8.2%	-11.8%	-8.9%	17.9%	33.5%	20.2%	NA	NA	31.9%
BugleRock Special Situations Portfolio	Aug-22	3.83%	-15.15%	-17.13%	-2.51%	29.10%	NA	NA	NA	30.52%
CARNELIAN Shift Strategy	Oct-20	9.1%	-12.2%	-10.6%	18.4%	43.3%	28.1%	NA	NA	37.8%
Composite Emerging Star Fund	May-19	7.12%	-13.67%	-13.18%	24.00%	30.42%	16.72%	29.83%	NA	20.67%

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SMALL & MID CAP

AMC& SCHEMENAME	INC DATE	STRATEGY PERFORMANCE								
		1M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
Edelweiss Focused Mid & Smallcap	Aug-15	3.80%	-16.53%	-23.06%	-3.82%	10.39%	3.33%	23.95%	NA	8.39%
Edelweiss Focused Mid & Smallcap Series II	Aug-15	3.54%	-17.78%	-24.50%	-7.74%	7.22%	1.38%	23.30%	NA	6.97%
Green Lantern C Growth Fund	Dec-17	4.98%	-4.44%	-5.17%	24.62%	62.03%	47.49%	58.05%	NA	24.97%
ICICI Prudential PMS PIPE Strategy	Sep-19	6.60%	-13.01%	-14.81%	9.39%	31.15%	23.71%	39.69%	NA	27.01%
InCred Small& Midcap Portfolio	May-21	5.54%	-18.28%	-18.64%	18.80%	27.24%	21.16%	NA	NA	13.84%
Karma Capital Lotus	Feb-23	7.5%	-7.3%	-13.2%	10.0%	28.1%	NA	NA	NA	27.3%
Kotak Small & midcap	Apr-12	4.59%	-14.95%	-21.03%	-4.68%	16.94%	9.17%	29.89%	13.01%	15.85%
Moneybee QueenBee -	AUG-07	4.16%	-22.31%	-16.40%	3.23%	40.55%	23.08%	49.67%	17.25%	20.90%
Narnolia Mid & Small	May-15	9.23%	-13.17%	-12.84%	13.37%	30.06%	16.40%	26.64%	NA	19.08%
Motilal Oswal Mid To Mega Strategy	Dec-19	7.1%	-15.6%	13.7%	12.6%	37.6%	15.8%	31.9%	NA	24.4%
Phillip Emerging India Portfolio (PEIP)	Aug-17	5.37%	-11.27%	-14.48%	1.49%	18.31%	10.83%	22.49%	NA	12.43%
Roha- Emerging Champions Portfolio	Sep-20	9.63%	-16.31%	-13.79%	6.55%	37.16%	20.18%	NA	NA	34.11%
SVAN Investment Management Velocity	Jul-23	7.87%	-12.90%	-11.78%	25.73%	NA	NA	NA	NA	32.25%
WALLFORT Ameya Fund	Dec-22	-3.26%	-16.87%	-9.73%	26.13%	NA	NA	NA	NA	51.03%
WALLFORT Diversified Fund	Nov-18	2.30%	-20.36%	-24.14%	35.62%	59.92%	34.43%	50.43%	NA	22.97%
Wallfort India Contra Equity Fund	24Feb	4.95%	-11.49%	-6.07%	22.62%	NA	NA	NA	NA	29.86%
WallfortAvenue Fund	Jan-22	0.72%	-16.49%	-12.62%	7.84%	40.46%	NA	NA	NA	23.52%
WallfortKosh Value Fund	Feb-24	6.10%	-15.14%	-17.65%	NA	NA	NA	NA	NA	-15.83%
Wallfort Focus Fund	Jan-24	5.26%	-10.64%	-12.63%	NA	NA	NA	NA	NA	-6.98%

MULTI ASSET

AMC & SCHEME NAME	INC DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
ACE Regular Income	Oct-18	2.12%	-8.61%	-9.29%	3.69%	37.29%	24.99%	29.76%	NA	16.56%
First Global – INDIAN Multi-Asset Allocation PMS (IMAAP)	Feb-20	5.67%	-6.10%	-11.64%	3.26%	15.92%	10.37%	16.70%	NA	14.88%
Pace Financially- Tresor Smart alpha	Jul-24	6.00%	-5.41%	-6.11%	NA	NA	NA	NA	NA	-1.96%
Pace Financially - SKG India Value	Jul-23	-7.56%	-31.31%	-41.62%	-27.12%	NA	NA	NA	NA	-0.73%
Prabhudas Lilladher Multi Asset Dynamic Portfolio Alpha	Sep-23	6.7%	-9.4%	-15.8%	-3.0%	NA	NA	NA	NA	9.2%
Prabhudas Lilladher Multi Asset Dynamic Portfolio	Jun-21	5.5%	-2.1%	-8.3%	2.9%	14.1%	9.4%	NA	NA	7.7%
Right Horizons AllSeasons	Nov-19	6.77%	-4.63%	-8.81%	6.86%	18.05%	11.53%	19.73%	NA	14.35%
Pace Financially- Tresor flexi	Dec-20	12.23%	-0.74%	-6.51%	6.02%	14.39%	13.08%	NA	NA	12.95%

MULTI CAP

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	S I
AAA Focus Plan(AAAFP)	Nov-14	7.3%	-4.9%	-9.6%	14.5%	20.3%	13.1%	23.8%	13.4%	14.2%
AAA INDIA OPPORTUNITY PLAN(AAAIOP)	Nov-09	5.9%	-6.7%	-12.0%	12.9%	23.8%	15.7%	27.1%	14.6%	18.3%
AbakkusAll Cap Apaproach	Oct-20	8.0%	-7.0%	-13.3%	1.8%	21.4%	13.6%	NA	NA	25.2%
Abakkus Diversified alpha Approach	Jan-24	5.7%	-8.0%	-13.7%	2.9%	NA	NA	NA	NA	3.5%
Abans Growth and Momentum	12Jan	9.39%	-12.89%	-15.14%	6.16%	22.34%	13.29%	28.18%	15.81%	21.66%
Accura Cap Alphagen	Dec-15	9.30%	-13.00%	-16.60%	1.80%	21.00%	11.20%	22.00%	NA	12.90%
Alchemy Ascent	Sep-19	5.1%	-19.1%	-25.5%	-9.1%	23.1%	8.3%	24.3%	NA	15.7%
Alchemy High Growth	May-02	7.4%	-19.0%	-25.7%	-11.3%	15.4%	6.2%	16.5%	8.3%	19.6%
Alchemy High Growth Select Stock	Dec-08	5.8%	-16.9%	-14.3%	8.2%	27.8%	13.2%	26.6%	14.0%	19.6%

MULTI CAP

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	S I
ASK-Indian Entrepreneur Portfolio	Jan-10	7.22%	-3.01%	-11.89%	4.24%	17.57%	6.48%	19.75%	11.76%	16.43%
ASK-Indian Select Portfolio	Jan-10	9.79%	-9.64%	-15.46%	-2.33%	15.32%	5.48%	16.53%	9.95%	14.35%
ACE Multicap	Aug-18	5.78%	-8.78%	-14.52%	1.87%	44.12%	31.36%	39.66%	NA	19.59%
Ambit Alpha Growth	Jan-21	10.60%	-18.40%	-15.10%	11.00%	44.90%	24.40%	NA	NA	27.40%
ASK LightHouse Portfolio	Mar-24	15.03%	-11.64%	15.00%	7.86%	NA	NA	NA	NA	10.03%
BayCapital India Opportunites Portfolio (PMS)	Jan-23	2.95%	-8.32%	-13.98%	6.36%	21.43%	NA	NA	NA	16.92%
Bonanza Aegis	May-22	2.83%	-18.46%	-12.08%	17.15%	37.61%	NA	NA	NA	26.47%
Bonanza Edge	Aug-15	7.61%	-12.84%	-18.44%	0.85%	31.68%	20.80%	41.95%	NA	19.91%
Bonanza Multicap	Jul-18	8.74%	-20.19%	-16.52%	8.03%	38.60%	21.62%	42.13%	NA	21.97%
Bonanza Value	Sep-11	5.42%	-16.87%	-15.85%	-7.21%	31.13%	15.86%	24.80%	14.01%	19.24%
BugleRock Core Value Concentrated Option	Apr-19	5.97%	-3.99%	-8.13%	8.31%	21.17%	16.86%	23.80%	NA	15.4%
BugleRock Core Value Regular Option	May-19	6.33%	-7.20%	-11.17%	6.02%	22.29%	19.05%	25.11%	NA	16.91%
CapGrow Growth Strategy	Oct-18	4.37%	-13.33%	-18.04%	4.45%	13.63%	7.70%	21.85%	NA	11.01%
Capital 8 LLP Infinity Fund	FEB-24	0.90%	-11.50%	-16.13%	19.30%	NA	NA	NA	NA	19.04%
CapGrow SPECIAL SITUATIONINV. APPROACH	Oct-18	5.01%	-16.34%	-14.41%	8.80%	24.12%	12.81%	31.79%	NA	17.13%
CARNELIAN BESPOKE STRATEGY	Jul-21	9.2%	-13.0%	-12.4%	7.0%	34.5%	25.7%	NA	NA	26.5%
Carnelian capital compounder strategy	May-19	10.9%	-7.5%	-11.1%	8.1%	29.2%	18.2%	25.3%	NA	18.0%
CARNELIAN CONTRA PORTFOLIO STRATEGY	Jan-22	8.5%	-9.3%	-18.9%	6.5%	43.1%	32.3%	NA	NA	31.4%
Equirus Core Equity	May-22	6.47%	-8.80%	-15.36%	1.77%	12.78%	NA	NA	NA	12.79%
Fractal FCILLP OPPORTUNITIES	Jun-22	5.61%	-10.17%	-12.54%	12.68%	28.15%	NA	NA	NA	23.86%
GREEN PORTFOLIO SPECIAL	Jul-18	5.54%	-16.49%	-16.31%	11.60%	27.74%	16.27%	32.61%	NA	23.24%
Helios-India Rising Portfolio	Mar-20	7.34%	-9.27%	-10.24%	6.78%	26.68%	15.22%	NA	NA	21.78%
ICICI Prudential Value Strategy	Aug-19	7.29%	-6.20%	-13.39%	5.14%	32.80%	24.93%	31.28%	14.86%	12.89%
ICICI Prudential PMS Contra Strategy	Sep-18	7.74%	-3.11%	-11.36%	7.02%	28.28%	20.52%	33.29%	NA	19.67%
ICICI Prudential PMS Growth Leaders Strategy	Dec-07	7.23%	-7.04%	-14.11%	5.88%	25.29%	16.55%	27.21%	13.45%	12.12%

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MULTI CAP

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	Date	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI
ICICI Prudential PMS ACE Strategy	Dec-10	6.67%	-6.18%	-11.25%	12.03%	29.29%	18.33%	28.61%	14.01%	14.50%
ICICI Prudential PMS Quantative Strategy	Feb-24	7.08%	-5.35%	-13.58%	4.83%	NA	NA	NA	NA	3.69%
InCred Multicap Portfolio	Feb-21	5.83%	-14.61%	-16.18%	21.73%	33.12%	21.06%	NA	NA	16.61%
Invasset LLP Growth Pro Max	JAN-20	8.50%	0.79%	-7.19%	6.13%	55.67%	30.90%	43.64%	NA	33.01%
Invesq Multicap Opportunities Portfolio	May-24	7.03%	-10.19%	-9.25%	NA	NA	NA	NA	NA	3.31%
Joindre Value Fund	Jan-12	5.91%	-11.86%	-15.29%	6.82%	16.92%	8.95%	18.13%	NA	12.67%
KarmaCapital Jasmine	Aug-23	6.9%	-5.0%	-12.4%	5.7%	NA	NA	NA	NA	12.4%
KarmaWealth Builder	Dec-06	7.3%	-5.9%	-11.2%	7.2%	30.3%	14.4%	37.8%	15.5%	13.1%
Motilal Oswal NextTrillion Dollar Opportunity Fund	Aug-07	7.2%	-15.8%	-19.7%	0.2%	19.1%	8.1%	19.4%	11.3%	14.3%
Motilal Oswal-FOUNDERS	Mar-23	10.7%	-18.6%	-16.0%	12.9%	34.9%	NA	NA	NA	34.5%
MotilalOswal-VALUE MIGRATION	Feb-23	9.1%	-16.9%	-16.7%	10.2%	32.2%	19.7%	25%	10.8%	19.5%
Moat UpperCrust Wealth Fund	Jan-22	14.89%	-10.48%	-11.98%	14.84%	35.04%	18.17%	NA	NA	14.83%
Narnolia Multicap Strategy	Mar-12	8.6%	-7.9%	-11.9%	4.2%	15.1%	6.8%	19.8%	10.8%	15.2%
Nine Rivers Aurum Multiplier Portfolio	Dec-19	3.60%	-9.40%	-15.40%	9.90%	26.9%	15.40%	19.60%	NA	16.30%
Negen Capital – Special Situation and Technology fund	AUG-17	4.63%	-14.18%	-13.53%	18.75%	39.99%	20.01%	50.07%	NA	17.46%
Phillip Signature India Portfolio (PSIP)	May-16	5.72%	-8.59%	-13.35%	0.89%	15.02%	7.27%	19.97%	NA	11.51%
Prabhudas Lilladhar Aqua	Jun-23	6.76%	-13.09%	-19.83%	-2.25%	NA	NA	NA	NA	25.08%
Quest -Quest Flagship PMS	Oct-07	4.50%	-16.18%	-18.39%	6.49%	23.43%	11.16%	24.39%	13.91%	16.02%
Quest-Multi PMS	Aug-14	6.34%	-16.70%	-18.79%	5.57%	27.04%	14.47%	28.84%	15.61%	15.59%
Right Horizons -Flexi Cap	Nov-12	6.22%	-15.85%	-22.06%	-3.27%	15.50%	7.74%	23.95%	11.64%	11.04%
Right Horizons– Perennial	Apr-21	7.51%	-20.24%	-15.81%	5.23%	27.75%	15.18%	NA	NA	15.45%
Renaissance India Next Portfolio	Apr-18	7.44%	-8.03%	-11.97%	12.97%	26.29%	21.48%	39.31%	NA	16.12%
SMC Growth Strategy	Oct-19	7.16%	-14.67%	-18.78%	1.35%	15.25%	11.62%	23.97%	NA	13.17%
Stallion Asset – Core fund	Oct-18	6.75%	-13.80%	-9.06%	30.57%	52.53%	32.27%	38.19%	NA	29.59%
Spark India @ 75scoreand Satellitestrategy	Jun-19	4.83%	-3.65%	-12.19%	3.18%	24.38%	19.30%	28.93%	NA	20.60%

MULTI CAP

AMC& SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	Date	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI
Spark India Impact Managers@ 75Flexicap strategy	Feb-19	6.32%	-1.62%	-9.80%	6.77%	26.07%	19.32%	25.67%	NA	17.56%
Sundaram India Secular Opportunities Portfolio (SISOP)	Feb-10	3.8%	-11.6%	14.0%	21.4%	10.5%	13.4%	22.9%	10.9%	17.2%
Sundaram Voyager Portfolio	Sep-17	3.6%	-12.8%	-9.7%	14.0%	24.0%	10.0%	26.3%	NA	12.3%
Sundaram SITP	Dec-23	3.3%	-11.2%	-9.5%	14.2%	NA	NA	NA	NA	16.7%
SilverArch India Equity Portfolio	Sep-17	11.08%	-12.37%	-16.34%	8.47%	34.58%	17.00%	26.40%	NA	12.39%
Samvitti Capital PMS Active Alpha Multicap	APR-21	10.01%	-22.18%	-16.80%	6.83%	45.55%	33.80%	NA	NA	30.87%
TurtleWealth Wealth Mantra	Sep-19	6.07%	-6.33%	-13.74%	3.30%	26.10%	12.97%	20.75%	NA	15.67%
Turtle Profit Mantra	Aug-21	6.63%	-10.99%	-16.73%	2.86%	32.02%	19.15%	NA	NA	19.80%
Turtle Growth Mantra	Oct-20	7.64%	-11.72%	-21.18%	-2.01%	22.54%	4.24%	NA	NA	12.18%
Valcreate Growing India	Feb-23	9.04%	-13.08%	-18.27%	1.04%	18.20%	NA	NA	NA	15.15%
ValueQuest Growth	Oct-10	3.39%	-15.44%	-18.09%	5.7%	26.96%	16.42%	34.96%	14%	17.65%
ValueQuest Platinum	Jul-14	3.92%	-16.62%	-17.60%	6.94%	29.84%	17.14%	38.63%	18.8%	19.55%

THEMATIC

AMC & SCHEMENAME	INC DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Ambit Build India	Jan-24	11.00%	-18.40%	-17.40%	16.20%	NA	NA	NA	NA	17.30%
BugleRock Growth Opportunities Portfolio	Nov-22	5.11%	-9.78%	-21.87%	-6.79%	12.14%	NA	NA	NA	7.03%
GREENPORTFOLIO - Super30 DynamicFund	Sep-19	0.48%	-24.05%	-21.15%	14.82%	31.72%	20.14%	34.95%	NA	27.80%
GREENPORTFOLIO-Dividend Yield Fund	Sep-19	8.72%	-9.01%	-11.06%	17.27%	43.01%	28.59%	40.24%	NA	30.92%
GREENPORTFOLIO-MNC Advantage Fund	Sep-19	7.00%	-13.93%	-17.66%	9.74%	26.14%	20.13%	NA	NA	22.88%
GREENPORTFOLIO-The Impact ESG Fund	Mar-22	0.51%	-19.32%	-20.45%	9.72%	38.33%	27.95%	NA	NA	27.69%
InCred Health careport folio	Feb-21	6.34%	-6.40%	1.28%	36.88%	43.34%	24.98%	NA	NA	19.10%
Incred - Focused Healthcare Portfolio	Jul-23	4.08%	-2.74%	7.73%	53.64%	NA	NA	NA	NA	53.04%
ValcreateIME Digital Disruption	Feb-23	2.86%	-20.13%	-13.18%	18.01%	34.15%	NA	NA	NA	32.44%
Valcreate Lifesciences and special opp.	Feb-23	7.74%	-12.07%	-12.87%	14.34%	19.21%	NA	NA	NA	15.07%
Green Portfolio The Green Ethical Fund	24-Jun	1.97%	-15.53%	-14.46%	NA	NA	NA	NA	NA	-10.62%

MID CAP ONLY

AMC & SCHEMENAME	INC DATE	STRATEGY PERFORMANCE								
		1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Marcellus Little Camps	Aug-19	5.00%	-9.39%	-11.19%	5.75%	2.98%	-3.34%	15.98%	NA	12.47%
Marcellus Rising Gaints Portfolio	Dec-21	4.46%	-5.63%	-9.31%	14.92%	14.54%	1.81%	NA	NA	-2.13%
Nuvama Equities expansion target	Jul-23	6.92%	-15.99%	-19.31%	7.28%	NA	NA	NA	NA	15.75%
Unifi Capital BCAD 2 Breakout 20	Jan-22	6.96%	-9.06%	-11.85%	1.71%	18.62%	14.17%	NA	NA	12.85%
Unifi Capital BCAD	May-18	6.73%	-7.14%	-10.60%	0.82%	18.44%	11.78%	25.70%	NA	14.39%
Unifi Capital Insider Shadow	May-10	5.40%	-12.11%	-14.20%	-3.16%	14.94%	5.79%	30.55%	NA	14.37%
Unifi Capital APJ 20	Sep-15	4.56%	-12.72%	-13.83%	4.72%	23.66%	16.72%	40.40%	NA	20.88%

Benchmark	Performance								
	1M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
S&P BSE 500 - TRI	7.30%	-4.40%	-11.80%	6.00%	21.80%	13.70%	26.30%	13.20%	14.70%
CRISIL Credit Index	1.17%	2.80%	5.25%	10.47%	10.77%	8.78%	NA	NA	6.73%
Nifty 50 TRI	6.31%	-0.29%	-8.51%	6.65%	17.79%	11.75%	23.69%	NA	15.27%
Nifty Multi Asset	3.94%	-1.24%	-4.49%	7.52%	15.29%	10.36%	17.21%	NA	12.05%

Return as 31st March 2025. Past performance may or may not sustain in the future. Investment in AIF & PMS is subject to market risk please read all the documents manfully before investing. AIF & PMS Experts India Pvt Ltd do not guarantee any performance

Top 1 Month Performers

AMC & SCHEME NAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10Y	SI
ASK LightHouse Portfolio	Mar-24	15.03%	-11.64%	15.00%	7.86%	NA	NA	NA	NA	10.03%
Moat UpperCrust Wealth Fund	Jan-22	14.89%	-10.48%	-11.98%	14.84%	35.04%	18.17%	NA	NA	14.83%
Tulsian PMS	Apr-20	13.80%	-7.22%	-20.30%	-4.46%	28.42%	18.67%	37.10%	NA	ND
ASK Emerging Opportunitites Portfolio	Aug-17	12.91%	-8.34%	-13.36%	4.90%	18.25%	8.38%	20.19%	NA	11.27%
Pace Financially- Tresor flexi	Dec-20	12.23%	-0.74%	-6.51%	6.02%	14.39%	13.08%	NA	NA	12.95%
SilverArch India Equity Portfolio	Sep-17	11.08%	-12.37%	-16.34%	8.47%	34.58%	17.00%	26.40%	NA	12.39%
Ambit Build India	Jan-24	11.00%	-18.40%	-17.40%	16.20%	NA	NA	NA	NA	17.30%
Camelian capital compounder strategy	May-19	10.9%	-7.5%	-11.1%	8.1%	29.2%	18.2%	25.3%	NA	18.0%
Motilal Oswal-FOUNDERS	Mar-23	10.7%	-18.6%	-16.0%	12.9%	34.9%	NA	NA	NA	34.5%
Ambit Alpha Growth	Jan 21	10.60%	-18.40%	-15.10%	11.00%	44.90%	24.40%	NA	NA	27.40%

Top 1 Year Performers

AMC&SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Incred – Focused Healthcare Portfolio	Jul-23	4.08%	-2.74%	7.73%	53.64%	NA	NA	NA	NA	53.04%
EQUITREE EMERGING OPPORTUNITIES	Mar-17	5.71%	-13.45%	-7.69%	38.26%	61.88%	36.79%	51.76%	NA	8.17%
InCred Health careport folio	Feb-21	6.34%	-6.40%	1.28%	36.88%	43.34%	24.98%	NA	NA	19.10%
WALLFORT Diversified Fund	Nov-18	2.30%	-20.36%	-24.14%	35.62%	59.92%	34.43%	50.43%	NA	22.97%
Stallion Asset – Core fund	Oct-18	6.75%	-13.80%	-9.06%	30.57%	52.53%	32.27%	38.19%	NA	29.59%
WALLFORT Ameya Fund	Dec-22	-3.26%	-16.87%	-9.73%	26.13%	NA	NA	NA	NA	51.03%
SVAN Investment Management Velocity	Jul-23	7.87%	-12.90%	-11.78%	25.73%	NA	NA	NA	NA	32.25%
Green Lantern C Growth Fund	Dec-17	4.98%	-4.44%	-5.17%	24.62%	62.03%	47.49%	58.05%	NA	24.97%
Composite Emerging Star Fund	May-19	7.12%	-13.67%	-13.18%	24.00%	30.42%	16.72%	29.83%	NA	20.67%
Counter Cycle Diversified Long Term Value	JUL-19	0.69%	-17.03%	-13.81%	23.06%	37.48%	30.78%	78.20%	NA	53.27%

April 2025

Top 3 Year Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Green Lantern C Growth Fund	Dec17	4.98%	-4.44%	-5.17%	24.62%	62.03%	47.49%	58.05%	NA	24.97%
EQUITREE EMERGING OPPORTUNITIES	Mar17	5.71%	-13.45%	-7.69%	38.26%	61.88%	36.79%	51.76%	NA	8.17%
WALLFORT Diversified Fund	Nov18	2.30%	-20.36%	-24.14%	35.62%	59.92%	34.43%	50.43%	NA	22.97%
Samvitti Capital PMS Active Alpha Multicap	APR-21	10.01%	-22.18%	-16.80%	6.83%	45.55%	33.80%	NA	NA	30.87%
GREEN LANTERN ALPHA FUND	Feb20	6.20%	-4.1%	-10.6%	12.9%	43.5%	32.7%	41.9%	NA	34.14%
CARNELIAN CONTRA PORTFOLIO STRATEGY	Jan22	8.5%	-9.3%	-18.9%	6.5%	43.1%	32.3%	NA	NA	31.4%
Stallion Asset - Corefund	Oct18	6.75%	-13.80%	-9.06%	30.57%	52.53%	32.27%	38.19%	NA	29.59%
ACE Multicap	Aug18	5.78%	-8.78%	-14.52%	1.87%	44.12%	31.36%	39.66%	NA	19.59%
Invasset LLP Growth Pro Max	JAN-20	8.50%	0.79%	-7.19%	6.13%	55.67%	30.90%	43.64%	NA	33.01%

Top 5 Year Performers

AMC & SCHEMENAME	INC.	STRATEGY PERFORMANCE								
	DATE	1 M	3 M	6 M	1 Y	2 Y	3 Y	5 Y	10 Y	SI
Counter Cycle Diversified Long Term Value	JUL-19	0.69%	-17.03%	-13.81%	23.06%	37.48%	30.78%	78.20%	NA	53.27%
Green Lantern C Growth Fund	Dec17	4.98%	-4.44%	-5.17%	24.62%	62.03%	47.49%	58.05%	NA	24.97%
EQUITREE EMERGING OPPORTUNITIES	Mar17	5.71%	-13.45%	-7.69%	38.26%	61.88%	36.79%	51.76%	NA	8.17%
WALLFORT Diversified Fund	Nov18	2.30%	-20.36%	-24.14%	35.62%	59.92%	34.43%	50.43%	NA	22.97%
Negen Capital- Special Situationand Technology fund	AUG-17	4.63%	-14.18%	-13.53%	18.75%	39.99%	20.01%	50.07%	NA	17.46%
Moneybee QueenBee -	AUG-07	4.16%	-22.31%	-16.40%	3.23%	40.55%	23.08%	49.67%	17.25%	20.90%
Invasset LLP Growth Pro Max	JAN-20	8.50%	0.79%	-7.19%	6.13%	55.67%	30.90%	43.64%	NA	33.01%
Accuracap Dynamo	Dec16	8.30%	-12.20%	-13.50%	21.70%	44.00%	28.50%	42.30%	NA	24.20%
Bonanza Multicap	Jul18	8.74%	-20.19%	-16.52%	8.03%	38.60%	21.62%	42.13%	NA	21.97%

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