



PMS AIF WORLD
High Performance Investing

DECEMBER, 2024 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
DECEMBER, 2024

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

November 2024 Market Review & Economic Outlook for 2025



Kamal Manocha

Founder & CEO

Dear Investors,

November 2024 was a month of mixed results for the Indian equity markets, as the Nifty 50 index faced fluctuations amidst a combination of domestic and global challenges.

KEY DRIVERS OF MARKET MOVEMENT:

Valuation Concerns and Weaker Q2 Corporate Earnings:

The Nifty 50 struggled due to high valuations, which raised concerns about the sustainability of current price levels. Additionally, weaker-than-expected Q2 corporate earnings added to the caution in the market.

Global Geopolitical and Economic Tensions:

Global factors, including the ongoing Russia-Ukraine conflict, tensions in the Middle East, and uncertainties surrounding the U.S. presidential elections, contributed to global market volatility. The prospect of India's Assembly polls also created political uncertainty, further clouding the outlook for markets.

Foreign Investor Sell-Offs:

Foreign Portfolio Investors (FPIs) continued to be net sellers in the Indian equity market. They pulled out ₹45,974 crore in November, though this was a notable improvement from the ₹1.14 lakh crore outflow in October. The easing of FPI outflows provided some respite to the market and raised hopes that foreign investor sentiment may stabilize.



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Domestic Institutional Investor (DII) Support:

On the positive side, the Indian market found support from strong buying by Domestic Institutional Investors (DIIs), who counterbalanced the outflows from FPIs. This helped limit the decline in the Nifty 50 index, which closed the month with a modest dip of just 0.31%.

Political Sentiment and Government Expenditure:

The BJP's victory in the Maharashtra Assembly elections lifted sentiment, as it fuelled expectations of increased government capital expenditure, which could provide a much-needed boost to the economy in the coming months.

INDIA'S ECONOMIC OUTLOOK FOR YEAR 2025:

India continues to position itself as a bright spot in the global economic landscape, with robust growth projections and an optimistic outlook despite facing some near-term challenges. The country is expected to lead as the fastest-growing major economy in 2025, with a projected **GDP growth of 6.8%**, underpinned by strong structural drivers and positive policy initiatives.

Key Economic Highlights:

GDP Growth:

India's economy is projected to grow by **6.8% in FY25**, making it the fastest-growing major economy globally. The country's growth remains resilient, supported by consumption, services, and infrastructure investments. The **Q3 FY25 GDP growth** is forecasted at **6.8%**, with an even stronger **7.2% growth** expected in **Q4 FY25**.

Inflation:

Inflation has recently spiked due to disruptions in food prices, particularly due to weather-related issues impacting the kharif (monsoon) crops.



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However, **inflation is expected to moderate**, with the average inflation forecast at **4.7% for FY25**, improving further to **4.1% in FY26**. By **Q4 FY25**, inflation is projected to ease to around **4.5%**, driven by a strong **rabi harvest** and stabilizing vegetable prices.

Monetary Policy Outlook:

The Reserve Bank of India (RBI) has signalled a more dovish stance in the near term, with the possibility of interest rate cuts starting as early as **February 2025**. The **repo rate** could be reduced from **6.5%** to **5.75%** by the end of the year, providing a boost to economic activity, particularly for sectors sensitive to interest rates like housing, automobiles, and consumer durables.

Corporate Performance and Market Strength:

India's equity market continues to attract both domestic and international investors, bolstered by the country's strong **return on equity (ROE)**. Around **one-third of Indian companies** report **ROEs above 20%**, and the **10-year average ROE** stands at **14%**, surpassing global peers like **Mexico** and **China**.

The overall **market risk profile** for India has improved, with **declining volatility** compared to other emerging markets. This reflects a more stable and predictable economic environment, which is attractive to investors.

Sectoral Drivers of Growth:

Agriculture: The **kharif grain output** has been robust, and the outlook for the **rabi crop** is promising. Strong agricultural performance is expected to contribute significantly to both **GDP growth** and **inflation control**.

Services: India's **services sector** remains resilient, driven by strong demand across information technology (IT), business process outsourcing (BPO), financial services, and other key industries.



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The sector's growth will continue to be a primary driver of GDP.

Infrastructure Spending: Government expenditure on infrastructure is also expected to remain high, supporting construction, transport, and urban development projects, which will further boost economic growth.

External Environment and Global Uncertainty:

India's relatively insulated economy, supported by strong domestic consumption and a diversified industrial base, positions it well to navigate external challenges. Despite global risks such as geopolitical tensions, inflationary pressures, and financial market instability, India's growth story remains compelling, with a focus on domestic drivers and structural reforms.

CHALLENGES TO MONITOR:

Inflation Volatility:

While inflation is expected to ease over the next two years, food price volatility and weather-related disruptions could still pose risks to short-term inflation control.

External Risks:

Global uncertainties, including the potential slowdown in global demand, higher commodity prices, and geopolitical risks, could affect India's export sector and inflation trajectory.

Corporate Earnings Momentum:

Mixed corporate earnings in the September quarter suggest some caution among businesses. However, this may be temporary, and the outlook for FY25 remains largely positive, driven by improving economic conditions and government spending.



Domestic Indices – 1M Change

SENSEX	79,802.79	0.52%
NIFTY 50	24,131.10	- 0.31%
NIFTY BANK	52,055.60	1.13%
NIFTY MIDCAP 100	59,009.75	4.64%
NIFTY SMALLCAP 100	19,530.10	4.71%

*Data as of 30th NOV 2024

Global Indices – 1M Change

DOW JONES	44,556.86	- 0.79%
NASDAQ 100	19,775.20	2.90%
S&P 500	6,066.06	0.56%
SHANGAI COMP	5,227.89	- 0.43%
NIKKEI 225	39,160.50	2.49%

*Data as of 30th NOV 2024



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NIFTY Indices – 1M & 1Y Change

IT	6.78%	32.32%
PHARMA	-2.18%	39.09%
PSU BANK	1.32%	33.68%
PVT BANK	-0.43%	9.27%
AUTO	-0.62%	33.67%
METAL	-3.14%	28.76%
FMCG	-2.13%	9.90%
INFRA	-1.01%	33.49%

*Data as of 30th NOV 2024



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Price-to-Earnings (PE) Ratio

NIFTY 50

22.21

NIFTY 500

25.77

NIFTY MIDCAP 100

41.30

NIFTY SMALLCAP 100

34.54

Market Outlook

India's **growth outlook** for FY25 remains strong and stable, with projected **GDP growth of 6.8%**, favourable inflation trends, and a supportive monetary policy. Key sectors such as agriculture, services, and infrastructure are expected to be the primary drivers of growth. The equity market's strength, supported by strong corporate earnings and improving market risk, makes India an attractive investment destination.

Despite the global uncertainty, India's **growth story** remains compelling, offering a combination of stability, resilience, and opportunity. The country's ability to attract both domestic and foreign capital, alongside an improving inflation and interest rate environment, will provide a solid foundation for continued growth into FY26.



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Top 10 Portfolios In Each Peer Group (Data as of 30th November 2024)

Peer Group 1: Ten Year Plus Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Market Cap
Value Quest	Platinum Scheme	3108.52	2.75%	2.10%	19.69%	32.71%	38.06%	25.95%	36.29%	21.15%	22.12%	Multi Cap
Nine Rivers Capital	Aurum Smallcap Opportunities	-	0.70%	-4.00%	11.10%	16.60%	32.80%	24.50%	35.70%	19.20%	28.77%	Small Cap
AccuraCap	PicoPower	612.89	-0.20%	-3.00%	14.40%	33.30%	34.60%	21.30%	34.20%	19.40%	24.60%	Mid & Small
ValueQuest	Growth Scheme	2096.99	1.11%	-0.34%	16.38%	26.83%	36.75%	22.82%	32.64%	16.83%	19.31%	Multi Cap
Care PMS	Growth Plus Value	873.67	-4.00%	-7.00%	13.00%	26.00%	31.00%	24.00%	33.00%	17.00%	23.00%	Mid & Small
Girik Capital	Multicap Growth Equity	1601.64	0.24%	-3.57%	11.40%	32.97%	34.75%	20.91%	25.78%	19.06%	21.40%	Multi Cap
Quest Investment	Multi PMS	-	0.96%	0.76%	15.98%	52.68%	30.72%	21.48%	25.72%	17.51%	18.14%	Multi Cap
Alchemy Capital Management	Select Stock	4704	3.10%	2.60%	18.70%	41.40%	31.00%	20.00%	20.70%	17.00%	21.20%	Multi Cap
AlfAccurate Advisors	IOP PMS	1806.59	0.60%	-1.90%	14.00%	34.90%	25.30%	18.80%	22.70%	16.60%	19.40%	Multi Cap
Dalal & Broacha	Long – Term Growth	977.4	1.52%	-0.94%	16.27%	39.21%	30.59%	18.83%	20.72%	14.04%	14.63%	Multi Cap
Peer Group 2: Five Year Plus Peer Group												
Company	Strategy	AUM (Cr)	1M	3M	6 M	1Y	2Y	3Y	5Y	SI	Market Cap	
Green Lantern Capital LLP	Growth Fund	909.93	-0.10%	-3.78%	8.28%	54.73%	62.07%	48.27%	48.99%	27.13%	Mid & Small	
Stallion Asset	Core Fund	3815.06	2.53%	7.36%	35.14%	70.47%	60.47%	33.93%	35.96%	34.16%	Multi Cap	
Equitree Capital Advisors	Emerging Opportunities	500.84	1.90%	-1.70%	28.91%	52.19%	59.16%	41.14%	40.44%	9.70%	Small Cap	
Green Portfolio	Super 30	206.49	0.98%	4.14%	27.33%	45.47%	44.79%	33.36%	37.58%	35.70%	Thematic	
Negen Capital	Special Situations Fund	1027.97	-0.24%	2.72%	21.51%	38.67%	39.26%	28.04%	38.02%	20.51%	Multi Cap	
SageOne Investment	Core Portfolio	4350	0.20%	-1.50%	13.80%	41.00%	39.10%	20.70%	30.00%	28.30%	Mid & Small	
KRIIS	Multi Cap Advantage PMS	275	8.30%	6.40%	25.90%	45.90%	35.60%	21.30%	27.48%	26.40%	Multi Cap	
Green Portfolio	Special	360.85	0.80%	-0.94%	16.27%	33.94%	30.94%	24.10%	32.10%	27.73%	Multi Cap	
Renaissance	India Next Portfolio	454	0.33%	-0.53%	19.07%	41.33%	30.67%	29.01%	28.45%	18.95%	Multi Cap	
Sameeksha Capital	Equity Fund	1554.2	-0.71%	-1.93%	15.56%	27.56%	36.40%	23.97%	32.15%	23.92%	Multi Cap	

- All data is as shared by respective AMC and is as TWRR guidelines.
- Top 10 in each peer group have been determined based on weighted average returns across time periods. Min AUM in 10-year peer group is taken at 600 Cr, in 5 Year at 200 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filer for less than 2Y.
- Data above 1Y is CAGR and upto 1Y is Absolute returns.
- ▲ For Sage One[▲], numbers have been taken since the formal inception post the SEBI RIA license and not SEBI PMS license.

Top 10 Portfolios In Each Peer Group (Data as of 30th November 2024)

Peer Group 3: Three Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Samvitti Capital	Active Alpha Multicap	367.27	1.47%	0.31%	13.53%	46.48%	58.68%	42.93%	-	42.07%	Multi Cap
Carnelian Capital	Shift	3350	5.40%	5.20%	32.70%	45.20%	49.60%	33.90%	-	46.60%	Mid & small
Electrum	Laureate Portfolio	-	4.50%	7.16%	39.95%	45.58%	45.30%	36.08%	-	44.48%	Mid & Small
Ambit Global Private Client	Alpha Growth	665	-0.70%	-0.20%	19.70%	50.00%	53.30%	32.50%	-	36.00%	Multi Cap
Invasset LLP	Growth Fund	422.72	-0.96%	-12.26%	-3.99%	24.36%	45.57%	30.06%	-	35.11%	Multi Cap
Abakkus Asset Manager	Emerging Opportunities Approach	5088.68	0.70%	4.30%	24.40%	35.00%	40.60%	26.10%	-	39.00%	Mid & Small
AlfAccurate Advisors	Budding Beasts	477.88	0.80%	-2.40%	18.70%	36.40%	38.50%	28.90%	-	33.10%	Mid & Small
Motilal Oswal AMC	Mid to Mega	1803.48	2.00%	3.30%	24.90%	40.30%	43.10%	21.00%	-	30.00%	Mid & Small
Incred PMS	Healthcare Portfolio	275	5.90%	19.00%	48.90%	55.20%	42.70%	26.10%	-	24.30%	Thematic
Incred PMS	Multicap Portfolio	440	2.20%	1.20%	29.90%	45.00%	42.00%	26.60%	-	23.90%	Multi Cap

Peer Group 4: Two Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category
Investsavvy	Alpha Fund	100	1.32%	3.18%	19.79%	58.99%	65.99%	-	-	51.17%	Multi Cap
Green Portfolio	Impact ESG	5.85	-0.13%	0.59%	21.60%	55.80%	50.17%	-	-	43.13%	Thematic
Carnelian Capital	YnG Strategy	80	0.10%	-6.50%	11.00%	49.90%	50.10%	-	-	41.40%	Multi Cap
Bonanza	Aegis	51.28	1.24%	1.12%	17.84%	43.24%	41.98%	-	-	37.46%	Multi Cap
Maximal Capital	Pathfinder Value Fund	136.32	0.86%	-5.54%	4.93%	26.63%	39.10%	-	-	40.05%	Multi Cap
True Beacon	Equity Factor Quant	434	-1.77%	-11.07%	2.06%	28.15%	29.59%	-	-	27.27%	Large & Mid
SBI	Aeon Alpha PMS	680	0.39%	1.26%	13.53%	27.84%	29.85%	-	-	21.85%	Multi Cap
Shree Rama Managers LLP	Shree Lakshmi Plan	-	-0.04%	-4.43%	10.48%	22.41%	29.88%	-	-	26.06%	Multi Cap
ValueQuest	Poise Scheme	-	1.72%	-1.89%	9.33%	7.24%	24.99%	-	-	25.37%	

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Top 10 Portfolios In Each Peer Group (Data as of 30th November 2024)

Peer Group 5: One Year Plus Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Motilal Oswal AMC	Founders	2223.69	2.10%	3.10%	27.50%	46.60%	-	-	-	56.40%	Multi Cap
Sowilo	Target Return Aggressive Fund	64.99	0.93%	2.28%	23.46%	46.28%	-	-	-	45.48%	Mid & Small
Wryght Research & Capital	Wright Factor Fund	217.5	0.80%	-0.70%	11.40%	47.55%	-	-	-	53.50%	Quant
Valtrust	Valtrust Momentum	-	0.18%	-4.06%	6.34%	42.61%	-	-	-	50.46%	Multi Cap
Sowilo	Multicap Fund	109.07	-0.94%	-3.31%	19.64%	37.59%	-	-	-	41.93%	Multi cap
Wryght Research & Capital	Wright Alpha Fund	72.6	-3.80%	-1.20%	15.60%	32.72%	-	-	-	47.90%	Quant
Ckredence	Business Cycle Fund	-	2.65%	4.20%	24.14%	33.93%	-	-	-	37.47%	Multi Cap
Wryght Research & Capital	Wright Factor Fund - Hedged	16	0.80%	1.90%	17.30%	37.74%	-	-	-	38.50%	Quant
Alchemy Capital Management	Smart Alpha 250	-	1.30%	-7.40%	5.40%	37.60%	-	-	-	40.50%	Large & Mid
Marathon Trends	Trend Following	476.6	0.55%	-4.06%	6.24%	28.05%	-	-	-	41.72%	Multi Cap

Peer Group 6: Sub One Year Peer Group											
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap
Alchemy Capital Management	Alpha Small Cap	-	-0.20%	-0.90%	21.60%	-	-	-	-	38.60%	Small Cap
Alchemy Capital Management	Smart Alpha Small & Micro Cap	-	-0.70%	-3.60%	5.40%	-	-	-	-	30.90%	Small Cap
Green Portfolio	Index Fund	2.11	2.90%	1.98%	-	-	-	-	-	16.67%	Large Cap
Abakkus Asset Manager	Diversified Alpha Approach	772.2	-0.50%	-2.00%	9.00%	-	-	-	-	16.20%	Multi Cap
Axis AMC	Emerging Stars	93.77	0.29%	1.32%	10.37%	-	-	-	-	8.16%	Mid & Small
Eklavya Capital	Equity	-	0.60%	1.00%	-	-	-	-	-	4.70%	Multi Cap
Ckredence	ICE Growth	-	2.61%	-	-	-	-	-	-	1.49%	Multi Cap

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- Data above 1Y is CAGR and upto 1Y is Absolute returns.

Top 10 Portfolios In Each Peer Group (Data as of 30th November 2024)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Bonanza	Value	41.71	1.15%	-2.23%	1.86%	37.88%	36.01%	24.51%	27.71%	15.65%	21.98%	Multi Cap
Master Trust	India Growth Strategy	434.12	-0.49%	-4.55%	8.45%	21.07%	25.39%	18.50%	29.66%	23.55%	26.68%	Mid Cap
ABANS	Growth & Momentum	-	-1.05%	-1.61%	11.27%	24.97%	24.14%	18.45%	25.06%	18.11%	23.39%	Multi Cap
Centrum	Multibagger	-	-1.00%	-1.90%	13.90%	28.90%	26.40%	16.10%	28.30%	18.20%	20.00%	Mid Cap
AccuraCap	Dynamo	10.72	0.70%	-3.90%	23.90%	45.60%	49.80%	33.00%	41.30%	-	27.30%	Small Cap
Asit C Mehta	Ace Multicap	196.95	0.83%	-5.38%	2.01%	43.65%	47.09%	36.90%	33.83%	-	23.28%	Multi Cap
Green Portfolio	Dividend Yield	21.74	4.20%	0.74%	17.91%	30.97%	43.85%	33.43%	37.49%	-	36.13%	Thematic
Estee Advisors	Long Alpha	63.65	-0.87%	-9.25%	6.65%	34.06%	36.75%	23.98%	32.78%	-	24.39%	Quant
Green Lantern Capital LLP	Alpha Fund	50.84	-0.96%	-5.01%	8.98%	39.97%	45.84%	36.14%	-	-	38.73%	Large & Mid
Magadh Capital Advisors LLP	Future Stars	40.5	3.24%	-1.45%	20.27%	45.74%	47.49%	32.79%	-	-	29.47%	Mid & Small

- The 7th Category captures those PMS names, which have a track record of very good performance, but were not captured in the 6 peer groups as these strategies have lower AUM than what is kept as a filter in the respective 6 Peer Groups.
- Top 10 in each peer group have been determined based on weighted average returns across time period. Min AUM in 10-year peer group is taken at 600 Cr, in 5 Year at 200 Cr & 3 Year at 100 Cr, in 2 Year at 50 Cr. No AUM filter for less than 2Y.
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Top 10 Portfolios In Each Peer Group (Data as of 30th November 2024)

Peer Group 8: Best as per November 2024 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
KRIIS	Multi Cap Advantage PMS	275	8.30%	6.40%	25.90%	45.90%	35.60%	21.30%	27.48%	-	26.40%	Multi Cap
Incred PMS	Healthcare Portfolio	275	5.90%	19.00%	48.90%	55.20%	42.70%	26.10%	-	-	24.30%	Thematic
Carnelian Capital	Shift	3350	5.40%	5.20%	32.70%	45.20%	49.60%	33.90%	-	-	46.60%	Mid & Small
Electrum	Laureate Portfolio	511	4.50%	7.16%	39.95%	45.58%	45.30%	36.08%	-	-	44.48%	Mid & Small
Sundaram Alternates	Voyager	-	4.30%	5.20%	18.90%	32.10%	21.00%	12.40%	21.70%	16.20%	20.20%	Mid & Small
Green Portfolio	Dividend Yield	21.74	4.20%	0.74%	17.91%	30.97%	43.85%	33.43%	37.49%	-	36.13%	Thematic
Incred PMS	Small & Midcap	225	3.80%	2.70%	31.70%	43.80%	40.00%	27.60%	-	-	23.40%	Mid & Small
Magadh Capital Advisors LLP	Future Stars	40.5	3.24%	-1.45%	20.27%	45.74%	47.49%	32.79%	-	-	29.47%	Mid & Small
Alchemy Capital Management	High Growth Select Stock	4704	3.10%	2.60%	18.70%	41.40%	31.00%	20.00%	20.70%	17.00%	21.20%	Multi Cap
Anand Rathi Advisors Ltd	Decennium Opportunity	-	3.10%	-2.22%	10.14%	24.60%	26.18%	20.81%	-	-	18.95%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	-0.26%	-4.23%	7.79%	21.27%	14.69%	13.76%	16.22%	12.24%
BSE 500 TRI	0.06%	-4.44%	7.87%	26.93%	20.01%	16.83%	19.56%	13.96%

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