



PMS AIF WORLD
High Performance Investing

JULY, 2024 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
JULY, 2024

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Is it time to recall the 4 most dangerous words in investing – "This Time it's Different?"

Dear Investors,



Kamal Manocha

Founder & CEO

India won the Men's T20 World Cup and brought back joy after a wait of 13 years!!!

But what's also hitting boundaries are our indices - market capitalisation of BSE-listed firms have been hitting record highs since the last week and the total has already crossed ~\$5.5 trillion with Sensex crossing 80K on 3rd July 2024.

The Indian stock market, like any other, is volatile BUT brimming with opportunities for investors. With the rally continuing, the fear of correction is keeping some investors worried, esp. those who **recall the 4 most dangerous words in investing - "This Time it's Different?"**

Given the upcoming Economic Budget'24, will we see Nifty50 hitting a Silver Jubilee at 25K soon?

India's stock market could see stellar gains this year, driven by government spending and sustained corporate earnings growth. The Nifty 500 (TRI) has already delivered ~12% returns this year – 6M as of June 2024, reaching a record high.

Strategists and investors surveyed by Bloomberg believe the upcoming budget will likely boost consumer spending and infrastructure development, benefiting businesses. More than half of the respondents estimated that the NSE Nifty 50 Index might rise to 26,000 points by the end of 2024.

Investors are now focusing on the Annual Budget, due this month, which will outline Prime Minister Modi's policy priorities under the new coalition government.



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Is it time to recall the 4 most dangerous words in investing – “This Time it's Different?”

Anticipation surrounding the budget is immense, particularly for domestic infrastructure, production, and growth. These factors are driving India's booming bull market. Additionally, crude oil prices stabilizing around \$80 per barrel and the strong performance of the monsoon in the last week are positive signs. An early monsoon has also improved the outlook for companies dealing with crops like rice, corn, and soybeans.

Foreign institutional investors appear to have turned aggressively bullish on the financial services segment and have bought shares worth over Rs 8,100 crore in the second half of June 2024.

SECTORWISE FII FLOWS			
FII Inflows	Jun 16-30	Jun 1-15	May-24
Financial services	8,162.00	1,008.00	(8,583.00)
Telecommunication	6,208.00	1,736.00	1,106.00
Consumer services	3,097.00	1,607.00	2,759.00
Capital Goods	2,929.00	(137.00)	6,024.00
Healthcare	2,886.00	413.00	161.00
Automobile and Auto Components	2,054.00	(315.00)	(4,029.00)
Information Technology	1,578.00	(2,559.00)	(5,802.00)
Construction Materials	1,475.00	302.00	(1,258.00)
Oil, Gas & Consumable Fuels	1,048.00	(3,683.00)	(5,554.00)
Consumer Durables	1,038.00	(953.00)	(761.00)
Chemicals	1,037.00	923.00	472.00
Realty	918.00	1,815.00	1,347.00
FII Outflows	Jun 16-30	Jun 1-15	May-24
Power	(2,439.00)	(59.00)	(3,042.00)
Metals & Mining	(1,128.00)	(1,861.00)	(953.00)
Fast Moving consumer Goods	(677.00)	(245.00)	(4,173.00)

Amt in Rs Crore | Source: NSDL



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Domestic Indices – 1M Change

SENSEX	79,032.73	+ 6.86%
NIFTY 50	24,010.60	+ 6.57%
NIFTY BANK	52,342.25	+ 6.86%
NIFTY MIDCAP 100	55,736.90	+ 7.80%
NIFTY SMALLCAP 100	18,317.70	+ 9.71%

*Data as of 30th June 2024

Global Indices – 1M Change

DOW JONES	39,118.87	+ 1.12%
NASDAQ 100	19,682.87	+ 6.18%
S&P 500	5,460.49	+ 3.47%
SHANGAI COMP	2,967.40	- 3.87%
NIKKEI 225	39,582.86	+ 2.85%

*Data as of 30th June 2024



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NIFTY Indices – 1M & 1Y Change

IT	6.4%	22.31%
PHARMA	3.2%	43.32%
PSU BANK	- 1.2%	79.21%
PVT BANK	6.7%	13.75%
AUTO	5.5%	66.37%
METAL	- 0.5%	58.06%
FMCG	2.7%	8.74%
INFRA	3.3%	59.16%

*Data as of 30th June 2024



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Price-to-Earnings (PE) Ratio

NIFTY 50

23.10

NIFTY 500

26.60

NIFTY MIDCAP 100

42.20

NIFTY SMALLCAP 100

29.90

Market Outlook

The markets have shown considerable resilience post-pandemic, with improving fundamentals. The Nifty is trading at 17.3 to 17.4 times PE on an FY26 basis, only 5-6% above the 10-year average, and far from a euphoric 30-times PE. On a trailing basis, the Nifty is at around 23 times, indicating that current valuations are similar to 2020 levels and that gains in the Nifty have mirrored profit increases.

While smaller companies and theme-based stocks have surged, overall valuations remain reasonable. The fact that every dip is being bought into is a positive sign, provided investments are made wisely rather than on speculative terms.



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

Peer Group 1: Ten Year Plus Peer Group													
Company	Strategy	AUM (Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Market Cap	Fund Manager
ICICI Prudential PMS	Value Strategy	571.5	4.1%	14.2%	24.0%	61.9%	58.9%	34.0%	26.7%	19.3%	14.0%	Multi Cap	Anand Shah
Nine Rivers	Aurum Small Cap	693	10.1%	17.8%	13.9%	47.0%	43.8%	23.3%	30.4%	23.1%	29.9%	Small Cap	Sandeep Daga
AccuraCap	PicoPower	719.4	9.5%	18.8%	22.4%	61.3%	39.8%	22.9%	32.5%	22.3%	25.1%	Small Cap	Raman Nagpal
Care PMS	Growth Plus Value	855	13.0%	27.0%	21.3%	65.8%	38.4%	26.7%	30.2%	20.2%	23.5%	Mid & Small	Jayant Mamania
Girik Capital	Multicap Growth Equity Strategy	1487.9	7.8%	16.5%	19.5%	60.5%	41.3%	23.0%	25.7%	23.0%	21.8%	Multi Cap	Charandeep Singh
ValueQuest	Growth Scheme	1789.7	11.2%	18.3%	16.5%	45.0%	40.5%	23.0%	31.2%	19.8%	19.7%	Multi Cap	Sameer Shah
Motilal Oswal	Value Migration	2388	9.4%	16.4%	22.1%	59.7%	39.4%	23.1%	19.9%	14.7%	20.5%	Multi Cap	Vaibhav Agarwal
Alchemy Capital Management	High Growth Select Stock	4481	9.5%	15.8%	23.2%	45.1%	33.7%	23.2%	18.6%	18.6%	21.2%	Multi Cap	Hiren Ved
ICICI Prudential PMS	Growth Leaders Strategy	1515.2	6.1%	14.8%	24.5%	48.9%	38.8%	23.9%	22.7%	16.6%	13.2%	Multi Cap	Anand Shah
AlfAccurate Advisors	IOP PMS	1679	8.2%	16.4%	20.6%	39.3%	33.0%	20.3%	21.7%	18.3%	19.6%	Multi Cap	Rajesh Kothari
Peer Group 2: Five Year Plus Peer Group													
Company	Strategy	AUM (Cr)	1M	3M	6 M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager	
Green Lantern Capital LLP	Growth Fund	740.3	7.1%	29.1%	44.9%	119.9%	78.8%	55.9%	46.0%	28.9%	Mid & Small	Abhishek Bhardwaj	
Stallion Asset	Core Fund	2137.9	9.9%	20.4%	34.9%	84.6%	57.3%	29.9%	34.0%	32.2%	Multi Cap	Amit Jeswani	
Samvitti Capital	Aggressive Growth	319.1	0.4%	18.8%	28.3%	80.6%	53.3%	29.3%	23.7%	17.2%	Multi Cap	Prabhakar Kudva	
Capitalmind	Adaptive Momentum	984.9	5.5%	11.2%	21.2%	63.6%	38.7%	22.1%	30.3%	29.0%	Multi Cap	Anoop Vijaykumar	
Negen Capital	Special Situations Fund	906.3	7.8%	20.5%	15.9%	59.3%	39.6%	28.3%	34.0%	19.8%	Multi Cap	Neil Bahal	
ICICI Prudential PMS	Contra Strategy	7694.4	4.0%	13.8%	22.2%	50.2%	47.0%	28.4%	26.3%	23.8%	Multi Cap	Anand Shah	
ValueQuest	Platinum Scheme	1937.8	12.8%	18.5%	21.2%	47.3%	41.6%	27.4%	36.2%	22.4%	Multi Cap	Ravi Dharamshi	
Sameeksha Capital	Equity Fund	1365.1	6.2%	9.4%	12.7%	49.1%	41.3%	24.3%	31.3%	24.0%	Multi Cap	Bhavin Shah	
360 ONE	Phoenix Portfolio	1470	7.3%	13.9%	19.4%	48.0%	40.0%	26.5%	27.5%	27.8%	Multi Cap	Bhavin Shah	
Carnelian Capital	Compounder Strategy	-	7.1%	15.2%	23.7%	50.7%	40.1%	21.5%	22.5%	22.4%	Multi Cap	Manoj Bahety	

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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 June 2024)

Peer Group 3: Three Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Samvitti Capital	Active Alpha Multicap	285.9	8.2%	25.6%	34.1%	93.9%	74.0%	42.7%	-	46.5%	Multi Cap	Prabhakar Kudva
Invasset LLP	Growth Fund	384.8	13.1%	22.8%	35.9%	117.3%	73.9%	37.0%	-	44.2%	Multi Cap	Anirudh Garg
Carnelian Capital	Shift	-	11.6%	15.6%	18.2%	53.5%	50.5%	29.6%	-	46.0%	Mid & Small	Manoj Bahety
Green Portfolio	Super 30	149.5	9.6%	24.5%	19.4%	44.7%	47.4%	38.6%	-	35.1%	Mid & Small	Divam Sharma
ICICI Prudential PMS	PIPE Strategy	6181.2	6.9%	20.0%	21.0%	56.1%	50.7%	35.0%	-	34.4%	Small Cap	Anand Shah
Roha	Emerging Champions	-	7.5%	13.5%	19.8%	51.3%	45.4%	28.1%	-	44.6%	Mid & Small	Dhiraj Sachdev
Electrum	Laureate Portfolio	-	11.2%	17.7%	14.0%	50.4%	42.6%	29.7%	-	41.5%	Mid & Small	Romil Jain
AlfAccurate Advisors	Budding Beasts	359.9	10.4%	23.7%	23.1%	49.7%	46.0%	32.2%	-	35.0%	Mid & Small	Rajesh Kothari
Abakkus Asset Manager	Emerging Opportunities	3999	10.2%	19.2%	15.5%	47.8%	43.9%	24.9%	-	39.6%	Mid & Small	Sunil Singhania
Vallum Capital Advisors	India Discovery Strategy	1688	9.5%	17.5%	16.2%	46.2%	41.7%	24.1%	-	33.2%	Mid & Small	Manish Bhandari

Peer Group 4: Two Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Category	Fund Manager
Carnelian Capital	YnG Strategy	-	5.8%	14.4%	26.6%	78.1%	60.6%	-	-	47.2%	Multi Cap	Manoj Bahety
Maximal Capital	Pathfinder Value Fund	120	4.7%	25.6%	17.3%	67.2%	58.4%	-	-	49.5%	Multi Cap	Sarvesh Gupta
Shree Rama Managers LLP	Shree Vriddhi Plan	66	12.3%	26.8%	30.3%	66.5%	47.8%	-	-	39.7%	Multi Cap	Arindam Samanta
Equirus	Core Equity	103.7	8.4%	10.9%	9.4%	19.4%	57.8%	-	-	53.6%	Multi Cap	Gaurav Arora
Shree Rama Managers LLP	Shree Lakshmi Plan	59.6	9.3%	17.0%	20.1%	48.5%	36.1%	-	-	31.2%	Multi Cap	Arindam Samanta
Motilal Oswal AMC	Ethical PMS	67	8.6%	14.3%	24.7%	54.0%	37.7%	-	-	23.1%	Multi Cap	Vaibhav Agarwal
Anand Rathi Advisors Ltd	Decennium Opportunity	-	9.0%	17.2%	20.4%	49.9%	37.4%	-	-	21.8%	Multi Cap	Mayur Shah
SBI	Aeon Alpha PMS	547	8.3%	19.9%	19.2%	42.4%	33.9%	-	-	23.7%	Multi Cap	Gaurav Mehta
ValueQuest	Poise Scheme	-	9.5%	14.0%	8.8%	30.0%	39.4%	-	-	30.5%	Multi Cap	Varun Goenka
UNIFI	BCAD2: Breakout 20	-	6.6%	10.2%	9.1%	31.4%	30.3%	-	-	21.0%	Mid & Small	Sarath Reddy

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

Peer Group 5: One Year Plus Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Valtrust	Momentum	-	6.5%	18.8%	34.8%	82.5%	-	-	-	69.5%	Multi Cap	Vishal Khatri
Prabhudas Liladher	Aqua Strategy	340.2	4.2%	14.5%	20.8%	75.8%	-	-	-	70.3%	Multi Cap	Siddharth Vora
BugleRock Capital	Special Situations	-	8.2%	15.9%	28.0%	64.8%	-	-	-	58.6%	Small Cap	Himanshu Upadhyay
Motilal Oswal AMC	Founders	1443	12.4%	16.6%	24.1%	61.7%	-	-	-	63.9%	Thematic	Ashi Anand
Marathon Trends	Trend Following	-	7.5%	13.2%	23.1%	51.2%	-	-	-	60.8%	Multi Cap	Atul Suri
Sowilo	Target Return Aggressive Fund	46	9.6%	25.5%	23.3%	51.4%	-	-	-	51.0%	Mid & Small	Sandip Agarwal
Sowilo	Multicap Fund	77.1	10.5%	19.9%	21.3%	50.4%	-	-	-	51.7%	Multi Cap	Sandip Agarwal
Valcreate	Growing India Strategy	-	9.9%	23.4%	23.9%	45.2%	-	-	-	43.5%	Multi Cap	Rajesh Pherwani
Valcreate	IME Digital Disruption	-	9.4%	10.2%	24.2%	39.5%	-	-	-	46.8%	Thematic	Ashi Anand
Valcreate Investment	Concentrated Microtrends	-	6.9%	13.2%	20.4%	41.9%	-	-	-	41.9%	Thematic	Ashi Anand

Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Wryght Research	Wright Factor Fund	120.5	9.0%	16.0%	31.2%	-	-	-	-	70.0%	Multi Cap	Siddharth Vora
Alchemy Capital Management	Smart Alpha 250	-	6.2%	22.2%	28.5%	-	-	-	-	57.4%	Large & Mid	Alok Agarwal
Wryght Research	Wright Alpha Fund	41	6.2%	16.8%	17.2%	-	-	-	-	51.4%	Multi Cap	Sonam Srivastava
Alchemy Capital Management	Alpha Small Cap	-	11.0%	16.2%	23.5%	-	-	-	-	51.1%	Small Cap	Alok Agarwal
Wryght Research	Wright Factor Fund - Hedged	17.5	5.8%	10.2%	17.8%	-	-	-	-	36.4%	Multi Cap	Sonam Srivastava
Alchemy Capital Management	Alpha 100	-	6.6%	7.8%	16.9%	-	-	-	-	35.2%	Large Cap	Alok Agarwal
Alchemy Capital Management	Smart Alpha Small & Micro Cap	-	8.1%	26.7%	33.9%	-	-	-	-	34.3%	Small Cap	Alok Agarwal
Abakkus Asset Manager	Diversified Alpha Approach	320	6.4%	12.0%	-	-	-	-	-	13.5%	Multi Cap	Sunil Singhania

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

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
Bonanza	Value	-	5.3%	16.1%	30.7%	72.6%	49.0%	25.3%	28.4%	20.6%	23.3%	Multi Cap
Master Trust	India Growth Strategy	511.5	8.6%	13.8%	12.8%	39.0%	37.1%	22.9%	29.1%	27.0%	27.7%	Mid & Small
Aditya Birla Capital	Select Sector Portfolio	305	8.5%	18.8%	24.2%	56.5%	41.3%	24.2%	27.1%	18.5%	17.8%	Multi Cap
ABANS	Growth & Momentum	-	8.5%	16.3%	13.2%	36.7%	34.1%	20.2%	25.4%	21.0%	24.0%	Multi Cap
Right Horizons	Super Value	-	11.5%	18.7%	13.0%	37.8%	37.3%	25.3%	27.3%	17.1%	17.3%	Mid & Small
Centrum	Multibagger	-	10.9%	26.6%	26.1%	50.2%	32.0%	19.7%	29.0%	21.1%	20.5%	Multi Cap
Kotak AMC	Small & Midcap	56	10.7%	18.1%	22.0%	48.5%	34.0%	22.4%	24.0%	18.2%	19.0%	Mid & Small
Estee Advisors	Long Alpha	60	7.8%	16.4%	23.4%	75.4%	49.7%	28.9%	34.3%	-	26.6%	Multi Cap
Green Lantern Capital LLP	Alpha Fund	38.7	7.5%	18.7%	28.7%	82.4%	58.8%	37.1%	-	-	42.7%	Large & Mid
Green Portfolio	Dividend Yield	24.8	6.9%	19.1%	13.3%	61.9%	51.6%	33.2%	-	-	37.0%	Thematic

- 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.
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Top 10 Portfolios In Each Peer Group (Data as of 30th June 2024)

Peer Group 8: Best as per May 2024 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
HEM Securities	IRSS	-	23.8%	31.0%	20.7%	58.3%	68.5%	-	-	-	48.2%	Small Cap
Equitree Capital Advisors	Emerging Opportunities	324.4	16.7%	34.9%	27.7%	86.0%	58.2%	36.9%	28.7%	-	8.7%	Small Cap
Equirus	Long Horizon Fund	850.2	16.0%	14.7%	11.3%	38.6%	33.8%	16.3%	31.6%	-	24.4%	Small Cap
Anand Rathi Advisors Ltd	Impress Portfolio	-	14.0%	26.2%	28.0%	52.8%	42.9%	26.6%	28.4%	-	17.2%	Multi Cap
Incred PMS	Multicap Portfolio	-	14.0%	27.5%	22.1%	46.2%	42.5%	21.4%	-	-	22.4%	Multi Cap
Invasset LLP	Growth Fund	384.8	13.1%	22.8%	35.9%	117.3%	73.9%	37.0%	-	-	44.2%	Multi Cap
Care PMS	Growth Plus Value	855	13.0%	27.0%	21.3%	65.8%	38.4%	26.7%	30.2%	20.2%	23.5%	Mid & Small
ValueQuest	Platinum Scheme	1937.8	12.8%	18.5%	21.2%	47.3%	41.6%	27.4%	36.2%	-	22.4%	Multi Cap
Motilal Oswal AMC	Founders	1443	12.4%	16.6%	24.1%	61.7%	-	-	-	-	63.9%	Multi Cap
Counter Cyclical Investments	Diversified Long Term Value	683	12.3%	25.5%	20.8%	60.9%	53.9%	50.9%	-	-	64.1%	Small Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	6.8%	8.1%	11.3%	26.7%	24.8%	16.5%	16.7%	13.6%
BSE 500 TRI	7.1%	11.7%	16.7%	38.3%	30.9%	19.9%	20.0%	16.7%

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