



PMS AIF WORLD
High Performance Investing

JUNE, 2024 NEWSLETTER

TOP 10 PORTFOLIOS IN EACH PEER GROUP

MONTH
JUNE, 2024

PREPARED BY
PMS AIF WORLD

MONTHLY PERFORMANCE REPORT

Invest in June, Avoid the Swoon

Dear Investors,



Kamal Manocha
Founder & CEO

The all-important market event for the year has finally concluded with the BJP-led-NDA forming a new coalition government. The largest democracy has created history with the same PM coming in for a third term.

The Budget (expected) in July is the next event we're going to look out for.

In May 2024 - While DIIs chose to contradict it, FIIs acted upon the "Sell in May and go away" adage - a phrase that suggests investors to sell stocks during the summer and reinvest later, in the fall.

However, we are not a fan of seasonal investment strategies and do not believe that new market highs should necessarily be feared - if you are making informed investments.

Apart from the fact that while most nations face the brunt of recession, India is poised to grow at a minimum of 8%; **here are 3 strong reasons why I'm confident that stocks can move higher from here:**

1. MODI 3.0

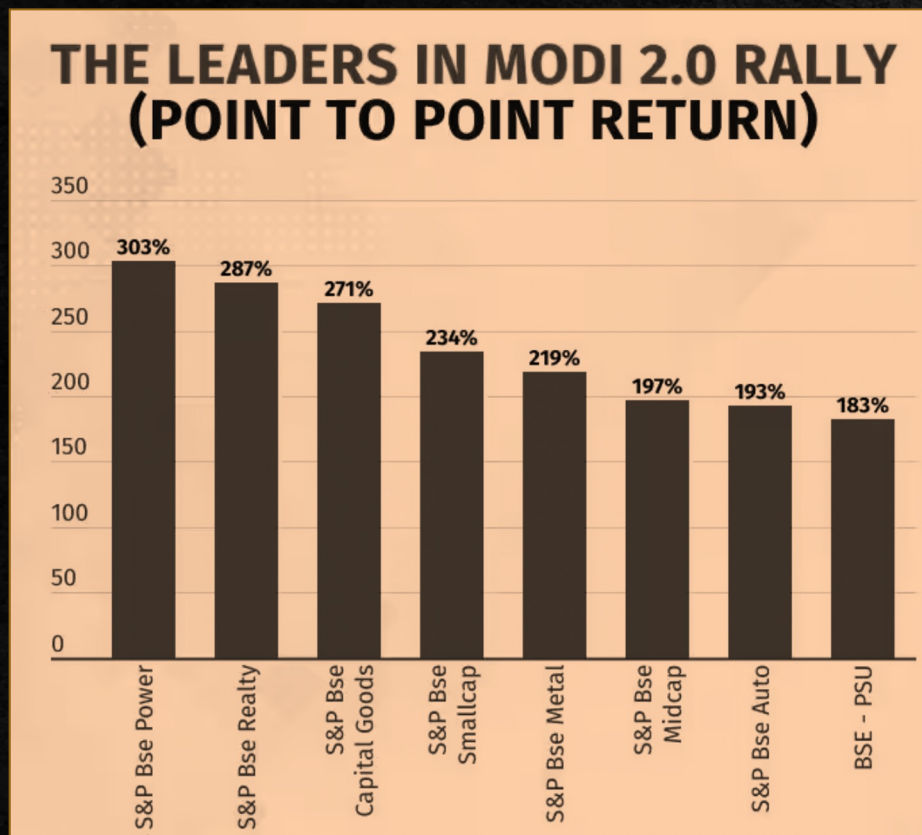
Setting aside any heightened emotions, it's important to recognize that, like many previous market-shifting events, this too shall pass and will soon become a non-event. But what will remain consistent is that with the BJP-led-NDA govt in picture, economic & policy reforms will continue to ensure doubling the valuation of the Indian stock market from its recent peak of \$5 trillion (currently at \$4.95 trillion) to \$10 trillion over the next four to five years.



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The recent election outcome is also expected to enhance Foreign Institutional Investor (FII) flows into India which would not only be positive for Capex stocks, but Infra & Pvt. Banks as well!



Source: Moneycontrol

2. EARNINGS GROWTH

In Q4 FY24, India Inc's aggregate revenue growth for [reported] 1,084 listed companies improved sequentially to 10.6% year-on-year in Q4 FY24, up from 10.1% in Q3 and 7.9% in the first two quarters, indicating an improvement in the demand environment. Within this, the Nifty 50 earnings grew a healthy 25% in FY24 and domestic cyclicals were key drivers of earnings. Although net profit growth slowed to 16.5% from the previous quarters, it remained robust given the high base effect.

Operating profit margins held steady despite elevated power and fuel costs, and non-financial firms improved their interest cover to over five times, demonstrating resilience in debt servicing ability.



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Looking ahead, the outlook appears promising. Financial firms played a key role in lifting both revenue and profit growth, suggesting a bright future for credit-fueled consumption and industrial activity. Demand growth showed signs of broadening, with significant contributions from both goods and services sectors, including consumer durables, e-commerce, automobiles, real estate, hotels, financial services, and entertainment. The end of political uncertainty will also spur further capex and infrastructure investments.

An overall profit growth of 12-18% appears feasible for FY25, indicating a positive sentiment for the future. The constant positive re-ratings by esteemed agencies just accelerate this sentiment.

3. INCREASE IN OVERALL CONSUMPTION & INFRA

We've been witnessing a muted consumption since the past 18 months. Now, with the election spending that's happened and the potential new structural policies & reforms that will be announced, both Infra & Consumption will get a boost.

Additionally, a favourable outlook towards the upcoming monsoon in India is also set to give a boost to Consumption. As the economy grows, individuals' purchasing power increases, driving demand for various goods and services.

Domestic consumption has been a key theme in emerging markets over the past decade. Easily accessible information has made people more aspirational, fueling growth in sectors such as consumer durables, retail, auto, healthcare, telecom, media, entertainment, tourism, paints, and consumer electricals, alongside FMCG, highlighting the potential for returns on consumption-based investing.



Domestic Indices – 1M Change

SENSEX	73,961.31	- 0.70%
NIFTY 50	22,530.70	- 0.33%
NIFTY BANK	48,983.95	- 0.84%
NIFTY MIDCAP 100	51,705.70	+ 1.65%
NIFTY SMALLCAP 100	16,696.70	- 1.85%

*Data as of 31st May 2024

Global Indices – 1M Change

DOW JONES	38,686.33	+ 2.30%
NASDAQ 100	18,536.65	+ 6.28%
S&P 500	5,277.50	+ 4.80%
SHANGAI COMP	3,086.81	- 0.58%
NIKKEI 225	38,487.83	+ 0.21%

*Data as of 31st May 2024



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NIFTY Indices – 1M & 1Y Change

IT	-2.5%	10.46%
PHARMA	-0.9%	48.25%
PSU BANK	-2.9%	83.29%
PVT BANK	-1.3%	7.80%
AUTO	4.2%	64.90%
METAL	6.0%	65.09%
FMCG	-0.2%	6.00%
INFRA	1.1%	58.76%

*Data as of 31st May 2024



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Price-to-Earnings (PE) Ratio

NIFTY 50

21.40

NIFTY 500

24.50

NIFTY MIDCAP 100

39.00

NIFTY SMALLCAP 100

26.30

Market Outlook

The whispers for higher capital gains tax on equities, the nature of upcoming reforms, the outcome of the monsoon, and the practicality of the Union budget will be crucial factors influencing market movements, going forward.

Therefore, while we remain confident about the overall market direction, a few curves in the journey of the Indian Indices can be possible.

Investors can enhance their return expectations by buying during market corrections rather than chasing rallies.



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Top 10 Portfolios In Each Peer Group (Data as of 31st May 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
Nine Rivers capital	Aurum Small Cap Opp.	625	-1.7%	2.2%	4.9%	40.7%	36.2%	22.5%	27.4%	24.3%	29.0%	Small Cap	Sandeep Daga
AccuraCap	PicoPower	660.33	-0.4%	5.2%	16.5%	57.6%	29.5%	21.2%	29.1%	22.8%	24.4%	Small Cap	Raman Nagpal
Girik Capital	Multicap	1359.6	-0.1%	6.2%	19.4%	60.0%	33.5%	21.4%	23.9%	23.4%	21.3%	Multi Cap	Charandeep Singh
ValueQuest	Growth Scheme	1576.5	-4.0%	5.4%	9.0%	36.4%	30.7%	21.7%	27.3%	20.0%	18.9%	Multi Cap	Sameer Shah
Care PMS	Growth Plus Value	755	0.9%	6.4%	11.4%	55.5%	25.1%	24.1%	25.4%	20.1%	22.5%	Mid & Small	Jayant Mamania
ICICI Prudential PMS	Growth Leaders Strategy	1404.5	2.3%	11.0%	27.3%	47.8%	31.1%	22.3%	20.9%	15.1%	12.9%	Multi Cap	Anand Shah
Alchemy Capital Management	High Growth	1047	5.9%	12.7%	30.7%	55.7%	30.9%	21.2%	13.4%	14.7%	21.9%	Multi Cap	Alok Agarwal
Alchemy Capital Management	High Growth Select Stock	4122	1.7%	8.1%	19.2%	39.5%	24.5%	21.6%	16.5%	18.6%	20.6%	Multi Cap	Hiren Ved
AlfAccurate Advisors	IOP PMS	1537.2	1.6%	8.1%	18.3%	34.9%	24.8%	18.1%	19.4%	18.6%	19.1%	Multi Cap	Rajesh Kothari
360 ONE	Multicap	4403	1.5%	7.7%	16.1%	31.0%	22.6%	16.4%	17.1%	16.5%	22.9%	Multi Cap	Anup Maheshwari
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	
Sage One [^]	Core	3800	0.2%	11.6%	23.9%	67.3%	28.8%	21.6%	25.8%	24.5%	Mid & Small	Samit Vartak	
Green Lantern Capital LLP	Growth Fund	616.45	2.4%	22.3%	42.9%	120.9%	75.2%	55.5%	43.1%	27.9%	Mid & Small	Abhishek Bhardwaj	
Stallion Asset	Core Fund	1799.5	1.6%	11.9%	26.1%	83.3%	44.6%	29.1%	31.4%	30.5%	Multi Cap	Amit Jeswani	
Samvitti Capital	Aggressive Growth	318.22	5.7%	15.1%	35.2%	92.5%	51.5%	29.8%	23.4%	17.3%	Multi Cap	Prabhakar Kudva	
Equitree Capital	Emerging Opportunities	278.18	0.8%	9.1%	18.1%	76.8%	47.3%	31.9%	22.4%	6.3%	Small Cap	Pawan Bharaddia	
Capitalmind	Adaptive Momentum	902.77	1.6%	5.3%	23.8%	66.8%	33.5%	22.8%	28.9%	28.2%	Multi Cap	Anoop Vijaykumar	
ICICI Prudential PMS	Contra Strategy	6844.6	3.5%	12.2%	28.0%	55.0%	39.4%	27.7%	25.1%	23.3%	Multi Cap	Anand Shah	
Negen Capital	Special Situations Fund	844.5436	-2.2%	1.7%	14.1%	55.0%	30.9%	27.8%	31.4%	18.7%	Multi Cap	Neil Bahal	
Sameeksha Capital	Equity Fund	1273.48	-3.0%	-0.1%	10.4%	49.6%	34.1%	24.0%	29.4%	23.3%	Multi Cap	Bhavin Shah	
Green Portfolio	Special	302.67	0.0%	3.9%	15.2%	45.1%	27.4%	22.9%	26.4%	27.1%	Multi Cap	Divam Sharma	

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- 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 31st May 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	253.37	0.7%	12.6%	29.0%	93.2%	62.7%	41.8%	-	44.3%	Multi Cap	Prabhakar Kudva
Invasset LLP	Growth Fund	297.85	5.7%	8.4%	29.5%	115.6%	57.8%	31.0%	-	41.1%	Multi Cap	Anirudh Garg
Green Portfolio	Super 30	132.11	1.4%	2.5%	14.2%	45.6%	37.4%	45.1%	-	33.2%	Mid & Small	Divam Sharma
Carnelian Capital	Shift	1786	-4.5%	2.1%	9.4%	47.8%	38.9%	29.3%	-	43.0%	Mid & Small	Manoj Bahety
ICICI Prudential PMS	PIPE Strategy	5623.4	3.0%	8.9%	19.4%	60.0%	42.8%	35.1%	-	33.2%	Small Cap	Anand Shah
Roha Asset Managers	Emerging Champions	-	-5.1%	0.7%	13.1%	55.3%	37.0%	30.4%	-	43.0%	Mid & Small	Dhiraj Sachdev
Electrum	Laureate Portfolio	-	-4.7%	1.0%	4.0%	45.8%	31.7%	28.2%	-	38.4%	Mid & Small	Romil Jain
AlfAccurate Advisors	Budding Beasts	317.57	3.2%	10.1%	14.9%	43.6%	36.4%	29.7%	-	32.0%	Mid & Small	Rajesh Kothari
Abakkus Asset Manager	Emerging Opportunities	3999	-1.4%	5.4%	8.4%	43.3%	31.8%	23.3%	-	37.0%	Mid & Small	Sunil Singhania
Vallum Capital Advisors	India Discovery Strategy	1520	-1.6%	5.0%	13.5%	39.8%	32.1%	22.1%	-	30.8%	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	-	2.8%	9.0%	35.0%	83.5%	53.7%	-	-	45.7%	Multi Cap	Manoj Bahety
Maximal Capital	Pathfinder Value Fund	113	7.3%	13.3%	20.7%	69.2%	49.9%	-	-	48.6%	Multi Cap	Sarvesh Gupta
Shree Rama Managers LLP	Shree Vriddhi Plan	52.24	7.3%	7.1%	21.1%	66.2%	39.0%	-	-	33.9%	Multi Cap	Arindam Samanta
Shree Rama Managers LLP	Shree Lakshmi Plan	51.76	1.4%	0.8%	10.8%	45.7%	30.1%	-	-	27.1%	Multi Cap	Arindam Samanta
Ckredence Wealth	Diversified	207	-2.2%	-2.5%	12.0%	46.3%	32.1%	-	-	23.0%	Multi Cap	Kartik Mehta
Equirus	Core Equity	101.61	-0.9%	1.4%	3.7%	16.1%	41.4%	-	-	41.7%	Multi Cap	Gaurav Arora
ValueQuest	Poise Scheme	-	1.2%	2.9%	-1.9%	28.3%	31.0%	-	-	26.7%	Multi Cap	Varun Goenka
SBI	Aeon Alpha PMS	483	0.9%	8.4%	12.6%	38.4%	27.1%	-	-	20.4%	Multi Cap	Gaurav Mehta
Ckredence Wealth	All Weather	225	-2.7%	-0.4%	10.7%	37.8%	28.9%	-	-	18.8%	Multi Cap	Kartik Mehta
UNIFI	BCAD2: Breakout 20	-	-2.0%	0.8%	7.8%	29.2%	24.5%	-	-	18.6%	Mid & Small	Sarath Reddy

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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 31st May 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 Partners LLP	Valtrust Momentum	-	2.7%	13.7%	34.1%	81.4%	-	-	-	67.1%	Multi Cap	Vishal Khatri
BugleRock Capital	Special Situations	-	-2.9%	3.8%	25.0%	60.6%	-	-	-	55.0%	Small Cap	Himanshu Upadhyay
Marathon Trends	Trend Following	-	2.5%	6.1%	20.5%	54.1%	-	-	-	56.3%	Mutli Cap	Atul Suri
Valcreate	Concentrated Microtrends	-	0.5%	4.0%	19.3%	38.2%	-	-	-	37.7%	Thematic	Ashi Anand
Valcreate	Growing India Strategy	-	3.0%	9.4%	18.8%	38.9%	-	-	-	36.6%	Multi Cap	Rajesh Pherwani
Valcreate	Digital Disruption	-	-4.9%	2.2%	10.1%	42.1%	-	-	-	40.3%	Thematic	Ashi Anand
Marcellus	Global Compounders	-	4.1%	2.2%	19.2%	33.4%	-	-	-	30.5%	Large Cap	Arindam Mandal
Fractal	FCI LLP Opportunities	-	0.2%	4.6%	11.5%	39.5%	-	-	-	31.0%	Multi Cap	Miten Lathia
BugleRock Capital	Thematic Opportunities	-	2.4%	7.2%	17.0%	29.6%	-	-	-	22.2%	Thematic	Himanshu Upadhyay
Maximal Capital	Income Fund	11	0.8%	4.2%	13.8%	30.9%	-	-	-	20.9%	Debt	Sarvesh Gupta
Peer Group 6: Sub One Year Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	SI	Market Cap	Fund Manager
Prabhudas Liladher	Aqua Strategy	312.71	6.6%	9.0%	21.7%	-	-	-	-	68.2%	Multi Cap	Siddharth Vora
Alchemy Capital Management	Smart Alpha 250	-	5.6%	14.2%	30.8%	-	-	-	-	48.4%	Multi Cap	Alok Agarwal
Wryght Research	Wright Factor Fund	94	-0.9%	4.9%	32.4%	-	-	-	-	55.9%	Multi Cap	Sonam Srivastava
Wryght Research	Wright Alpha Fund	32.9	4.3%	6.3%	14.8%	-	-	-	-	42.5%	Multi Cap	Sonam Srivastava
Sowilo	Target Return Aggressive Fund	45.99	-0.9%	10.8%	18.5%	-	-	-	-	39.1%	Mid & Small	Sandip Agarwal
Sowilo	Multicap Fund	66.18	-1.5%	4.0%	15.0%	-	-	-	-	38.1%	Mid & Small	Sandip Agarwal
Alchemy Capital Management	Smart Alpha Small & Micro Cap	-	0.8%	10.5%	-	-	-	-	-	24.2%	Small Cap	Alok Agarwal
Alchemy Capital Management	Alpha 100	-	0.5%	4.2%	17.7%	-	-	-	-	26.8%	Large Cap	Alok Agarwal
Wryght Research & Capital	Wright Factor Fund - Hedged	17.5	-1.5%	1.5%	17.4%	-	-	-	-	29.0%	Multi Cap	Sonam Srivastava
Nuvama	Absolute Return Strategy (NARS)	303	1.1%	5.2%	8.4%	-	-	-	-	15.2%	Debt	Ajay Vora

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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 31st May 2024)

Peer Group 7: Special Peer Group												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
ICICI Prudential PMS	Value Strategy	454.7	2.0%	12.0%	29.9%	70.8%	49.5%	33.6%	25.1%	17.0%	13.8%	Multi Cap
Master Trust	India Growth Strategy	476.99	-3.5%	2.6%	11.6%	33.8%	27.6%	21.9%	25.9%	27.3%	27.1%	Mid & Small
Aditya Birla Capital	Select Sector Portfolio	305	2.9%	11.3%	17.9%	49.1%	32.3%	23.9%	24.5%	19.0%	17.2%	Multi Cap
Right Horizons	Super Value	-	-2.6%	1.3%	4.8%	29.9%	23.1%	28.0%	27.1%	18.3%	17.6%	Mid & Small
ICICI Prudential PMS	Largecap Strategy	349	2.6%	11.5%	30.4%	55.0%	34.3%	23.9%	21.1%	15.4%	17.3%	Large Cap
ABANS	Growth & Momentum	-	-1.3%	4.6%	12.3%	32.5%	24.5%	18.3%	22.6%	21.0%	23.4%	Multi Cap
Centrum	Multibagger	-	1.3%	9.9%	13.2%	41.1%	21.5%	18.1%	25.6%	21.3%	19.7%	Multi Cap
Asit C Mehta	Ace Multicap	125.22	4.3%	9.0%	40.8%	98.0%	61.5%	41.3%	30.8%	-	25.1%	Multi Cap
Asit C Mehta	Ace Midcap	4.46	6.2%	14.3%	42.5%	102.0%	55.0%	39.1%	31.6%	-	23.1%	Mid & Small
Green Lantern Capital LLP	Alpha Fund	32.69	1.5%	9.7%	28.4%	81.9%	51.6%	36.3%	-	-	41.3%	Large & Mid

- 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.
- All data is as shared by respective AMC and is as TWRR guidelines.
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Top 10 Portfolios In Each Peer Group (Data as of 31st May 2024)

Peer Group 8: Best as per May 2024 Performance												
Company	Strategy	AUM(Cr)	1M	3M	6M	1Y	2Y	3Y	5Y	10Y	SI	Category
UNIFI	Holding Co	-	17.9%	22.5%	36.1%	63.8%	37.7%	24.1%	20.3%	-	24.4%	Mid & Small
ASK	Lighthouse Portfolio	-	8.9%	-	-	-	-	-	-	-	19.2%	Thematic
Shree Rama Managers LLP	Shree Vriddhi Plan	52.24	7.3%	7.1%	21.1%	66.2%	39.0%				33.9%	Multi Cap
Maximal Capital	Pathfinder Value Fund	113	7.3%	13.3%	20.7%	69.2%	49.9%	-	-	-	48.6%	Multi Cap
ABANS	Smart Beta Portfolio	-	6.9%	15.1%	20.6%	64.4%	34.6%	23.1%	21.5%	-	21.7%	Multi Cap
Prabhudas Liladher	Aqua Strategy	312.71	6.6%	9.0%	21.7%	-	-	-	-	-	68.2%	Multi Cap
Asit C Mehta	Ace Midcap	4.46	6.2%	14.3%	42.5%	102.0%	55.0%	39.1%	31.6%	-	23.1%	Mid & Small
Alchemy Capital Management	High Growth	1047	5.9%	12.7%	30.7%	55.7%	30.9%	21.2%	13.4%	14.7%	21.9%	Multi Cap
Invasset LLP	Growth Fund	297.85	5.7%	8.4%	29.5%	115.6%	57.8%	31.0%	-	-	41.1%	Multi Cap
Samvitti Capital	Aggressive Growth	318.22	5.7%	15.1%	35.2%	92.5%	51.5%	29.8%	23.4%	-	17.3%	Multi Cap

Index	1M	3M	6M	1Y	2Y	3Y	5Y	10Y
Nifty 50 TRI	0.0%	2.9%	12.5%	23.0%	17.9%	14.5%	15.0%	13.4%
BSE 500 TRI	0.8%	5.2%	17.7%	34.7%	23.3%	18.1%	18.0%	15.2%

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SECTOR 10 KHARGAR,
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