

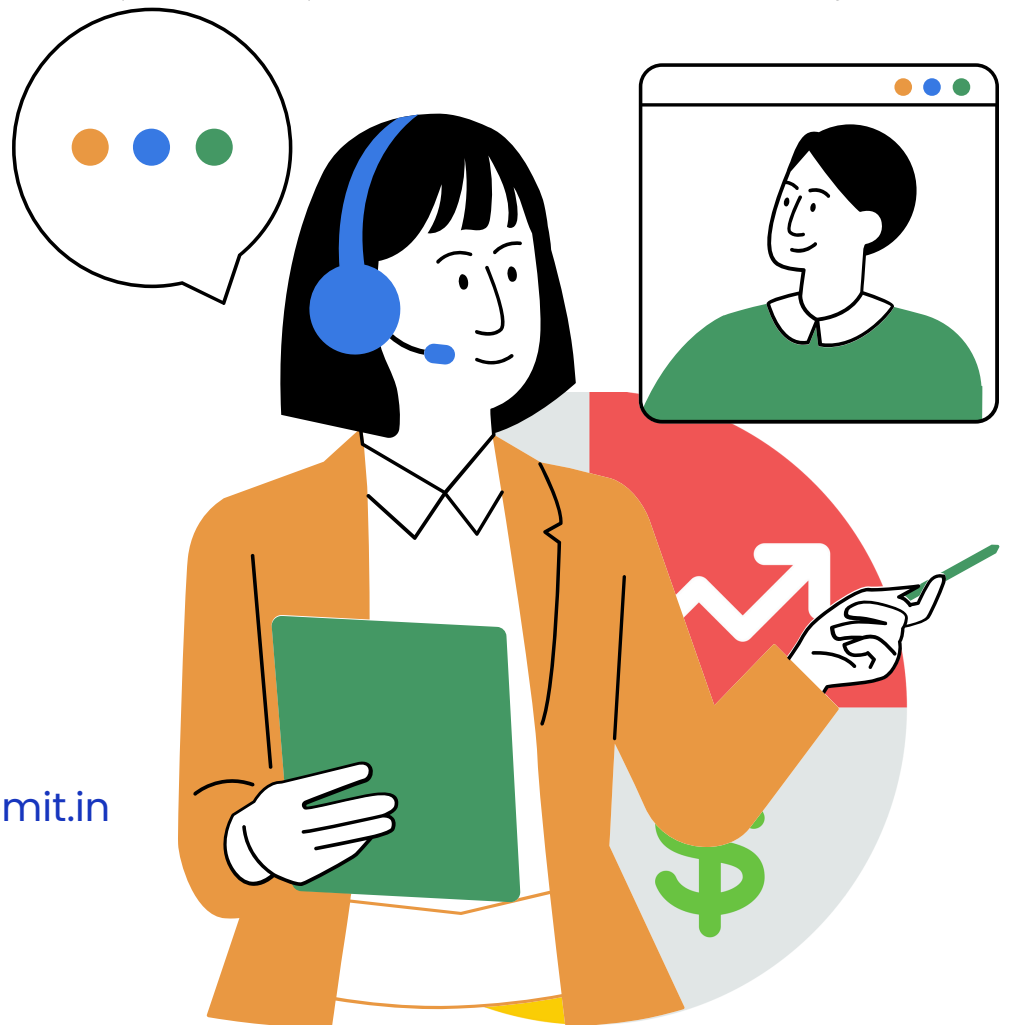


PORTFOLIO MANAGEMENT SERVICE



What Is a Portfolio Management Service (PMS)?

Portfolio Management Services (PMS) is an investment portfolio in stocks, fixed income, debt, cash, structured products, and other individual securities, managed by a professional money manager. Unlike a mutual fund, where investors own units of the entire fund, PMS investors own individual securities and have the flexibility to tailor their portfolio to personal preferences and financial goals.



PMS Investment Objective



Investment Objective

To generate long-term capital appreciation along with consistent dividend earnings by creating a portfolio invested in equity and equity-related securities of front-runner stocks from demanding industries. These industries are growing better or are expected to grow better than India's benchmark GDP growth. Front-runner companies are those with good market share, consistent profit margins, high solvency, and better liquidity. The more demand in the industry and the better the company, the more weightage it receives. Weightage will be adjusted based on maintained demand and quality over time. This investment is for those willing to invest for at least 10 years, with no lock-in period, though time must be spent to earn good returns.

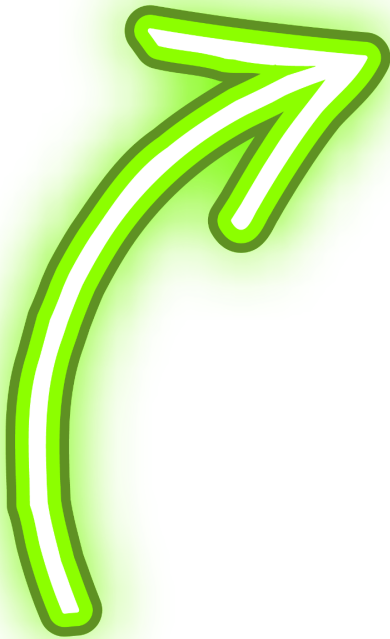


Types of Portfolio Managers

- **Discretionary Portfolio Manager:**
Manages funds independently based on the client's needs, with investments made at the manager's discretion.
- **Non-Discretionary Portfolio Manager:**
Manages funds based on the client's directions.



Who Can Sign Up for PMS ?



SIGN UP!

- Non-Resident Indians (NRIs)
- Hindu Undivided Families (HUFs)
- Partnership Firms
- Body Corporates (Private/Public),
- subject to RBI approval
- Registered Trusts
- Resident Individuals



www.profitfromit.in



Regulation and Governance

PMS is regulated by SEBI (Securities and Exchange Board of India). Only entities with specific SEBI registration can offer PMS. It is provided by specialized PMS players, asset management companies (AMCs), and brokerage houses.



Returns and Complaints

- Returns: Not guaranteed.
- Complaints: Can be registered on the SEBI Complaints Redress System (SCORES).



www.profitfromit.in



Qualifications to Open an Account

Must be over 18 years old and either a resident or non-resident Indian.



Tax Implications of PMS Investments

Each transaction is considered an independent trade, with capital gains tax applied based on whether the stock was held short-term or long-term. Currently, short-term capital gains tax is 15%, and long-term capital gains tax is 10%. STT charges also apply. Investors will receive transaction details but must manage their taxation matters.



Why India's Front Runners Fund?

India's growth story is strong, with an expected GDP growth of 7-8% in the next decade. Investing in demanding industries of India could yield better returns. These industries can outperform the country's GDP and potentially make large companies bigger and small companies larger. Investing in top-quality companies can lead to high growth and consistent earnings. The fund prioritizes sectors expected to demand high growth, with a maximum of 15% investment in any one sector.



WHY?

 www.profitfromit.in



INDIA'S FRONT RUNNER FUND





BALANCING THE INVESTMENT

Invest with proper balance in different asset class to have stability, Growth, Consistency & Liquidity. The investment should be well balanced understanding risk & reward. Give proper weightage to different asset class like:

- Equity
- Fixed Income securities
- Metal
- Real-Estate

Ask the Golden question:

If I stop working from today, tomorrow, or 5-10-15 years from now, what would be my Annual Residual Income.

Check the Portfolio that whether the assets which we are creating will help generate the above goal or not .

A stylized, handwritten signature in blue ink. The signature is fluid and cursive, with the first letter 'P' being particularly large and prominent. It appears to be the signature of PiYush Patel.

PIYUSH PATEL

FOUNDER

PROFITFROMIT

EQUITY: GROWTH INVESTING

GROWING ECONOMY

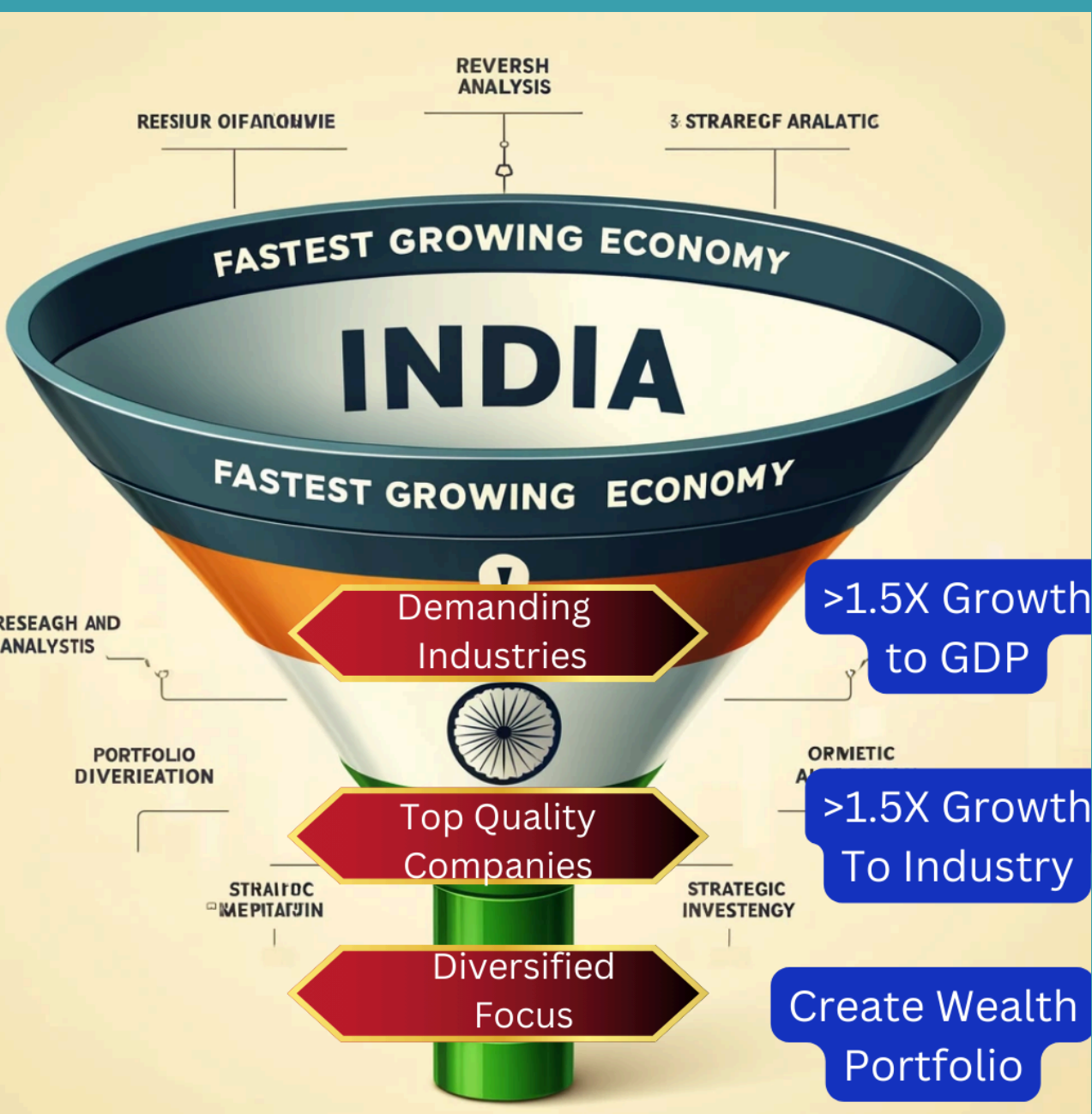
The amount of the growth of your asset largely depend on the growth and consistency of the economy. Before investing in any country ask the golden question to yourself:

- How much growth & consistency this country can give to my asset?

The more your country is growing along with consistency the more your asset will begowing and stable.

We recomend India as India is the fastest growing major economy of the world with high stable and reform oriented government.

- India Youngest economy till 2070
- India the fastest growing economy
- India fastest growing GDP/Capita.
- India with increased spending on Infra, Defense, Education, Healthcare, Governance, Make In India concept is among top 5 Economies and towards TOP 3 economy till 2028.



EQUITY: GROWTH INVESTING

DEMANDING INDUSTRIES

The amount of the growth of your asset largely even depend on the growth and consistency of the Industries where we are investing. Industry should be growing by 1.5X to GDP for high growth.

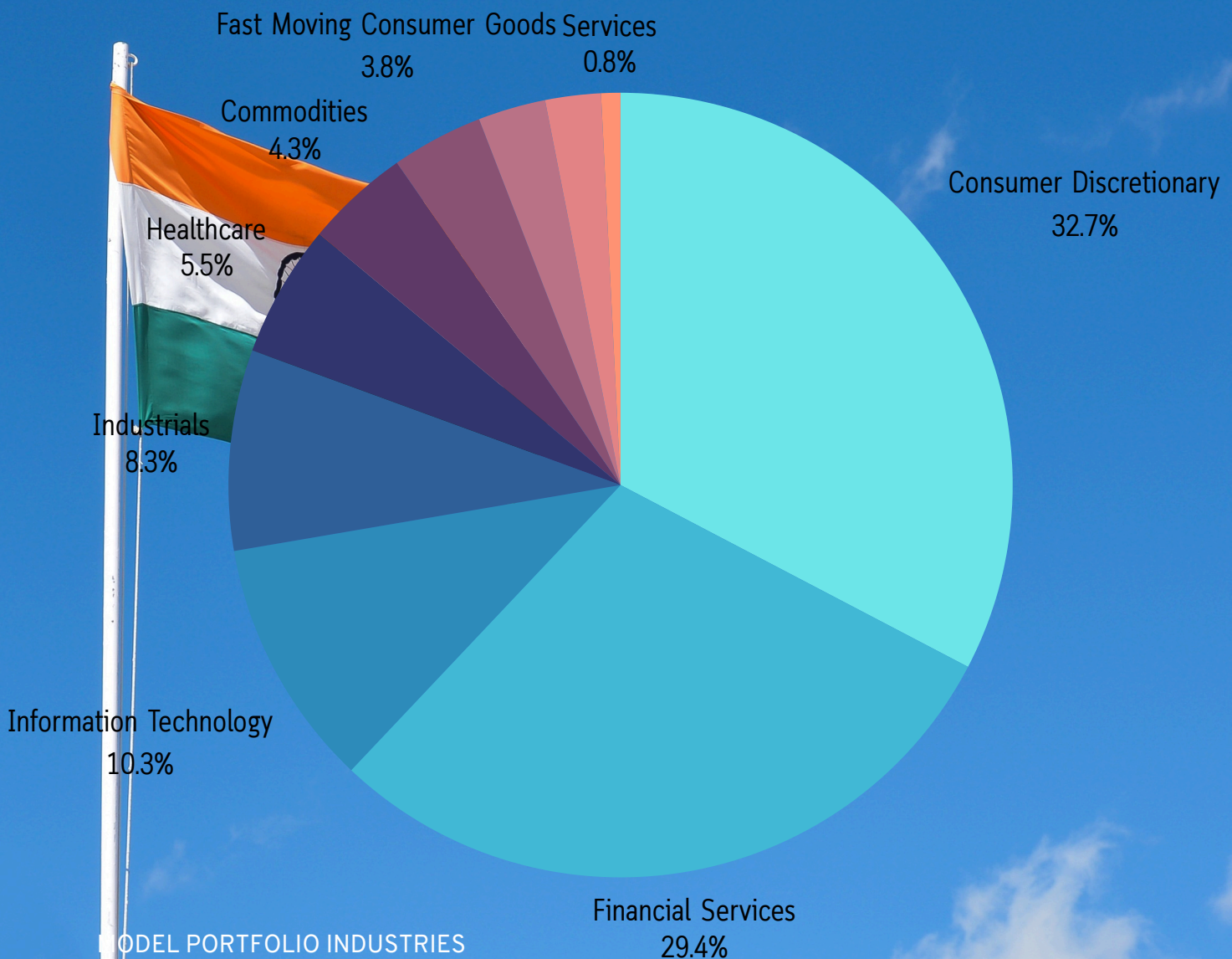
Before investing in any Industry ask the golden question to yourself:

- How much growth & consistency this Industry can give to my asset?

The more your industry is growing along with consistency the more your asset will be growing with high stability.

Do not only run after growth as we need stability and cashflow also. Diversify:

- Emerging Industries: Grow 2X to GDP with less or no initial cashflow.
- Growing Industries: Grow 1.5X to GDP with good cashflow
- Mature Industries: Growth 1X to GDP but are high cashflow industries.





EQUITY: QUALITY INVESTMENT

TOP QUALITY COMPANIES

INVEST IN THE COMPANIES THAT CAN TAKE BENEFIT OF INDUSTRY GROWTH BY GROWING VERTICALLY AS WELL AS HORIZONTALLY.

The amount of the growth of your asset largely depend on the growth of the economy along with industries where we invest but companies growing their market share in particular industries along with consistency in cashflow can give us stable and better return over the period of time.

Before investing in any Company ask the golden question to yourself:

- How much growth & consistency this Company can give to my asset?

The more stable company growing its marketshare with high corporate governance and better management can give investors better return.

- Is market share growing?
- Is Company able to have better cashflow v/s other peer companies .
- is the company having high Transparency with investors.

A MODEL PORTFOLIO: VALUE BUYING

The portfolio should provide better return TO GDP growth and can be high consistent if well diversified. Do not focus and diversify.

- First Diversify to reduce the risk
- The Focus to improve the return.

Look on Your Portfolio and ask your self the golden question:

Is my Portoflio created to take the Benefit for India Story along with consistency or not?

Portfolio should be providing:

- Growth
- Consistency
- Annual Residual income after pre-planned Years.

We should know the anwser in advance that what if Economy face resitance, do i have enough fixed securities investment to stay strong during vulenrable times.

Do i have enough cash to take the benefit of Value Buying during bad times?



INDUSTRY MODEL ALLOCATION:

19	32.75
Consumer Discretionary	TOTAL
TITAN	3.00
VOLTAS	2.75
JUBLFOOD	2.75
MARUTI	2.50
BAJAJ-AUTO	2.50
DMART	2.50
NAUKRI	2.00
ZOMATO	2.00
PAGEIND	1.75
IRCTC	1.75
HAVELLS	1.50
BALKRISIND	1.50
WONDERLA	1.25
ARE&M	1.25
ASIANPAINT	1.00
GODREJPROP	1.00
DIXON	1.00
KAJARIACER	0.50
ITCHOTELS	0.25



12	29.50
Financial Services	TOTAL
HDFCBANK	4.50
BAJFINANCE	4.25
IREDA	2.75
HDFCAMC	2.75
IEX	2.50
BAJAJHFL	2.50
CDSL	2.50
AUBANK	2.25
ICICIGI	2.00
SBIN	1.50
HDFCLIFE	1.50
IRFC	0.50

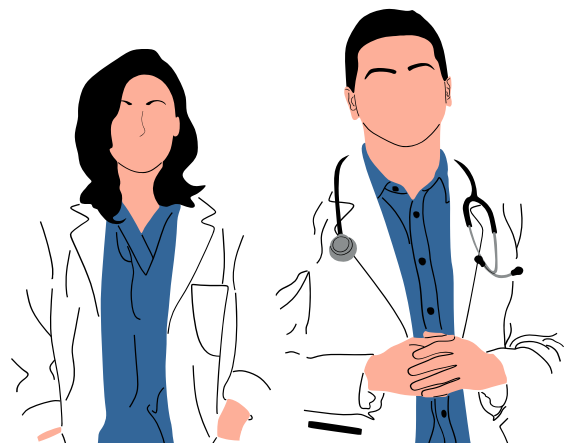
INDUSTRY MODEL ALLOCATION:

5	10.3
Information Technology	TOTAL
AFFLE	3.00
MAPMYINDIA	2.25
TCS	2.00
LTTS	1.75
TATAELXSI	1.25



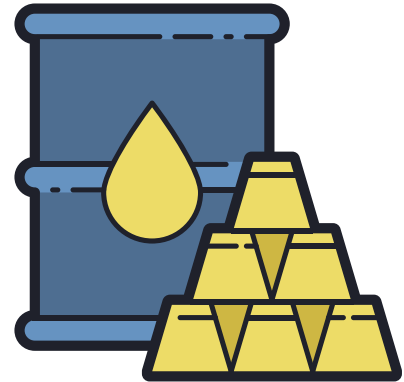
4	8.25
Industrials	TOTAL
LT	3.75
BEL	3.25
SUPREMEIND	0.75
Mazdock	0.50

3	5.50
Healthcare	TOTAL
DIVISLAB	2.75
LALPATHLAB	1.75
APOLLOHOSP	1.00



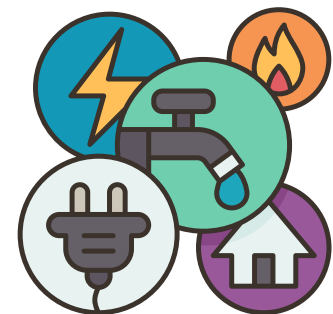
INDUSTRY MODEL ALLOCATION:

3	4.25
Commodities	TOTAL
ULTRACEMCO	2.00
PIDILITIND	1.50
PIIND	0.75



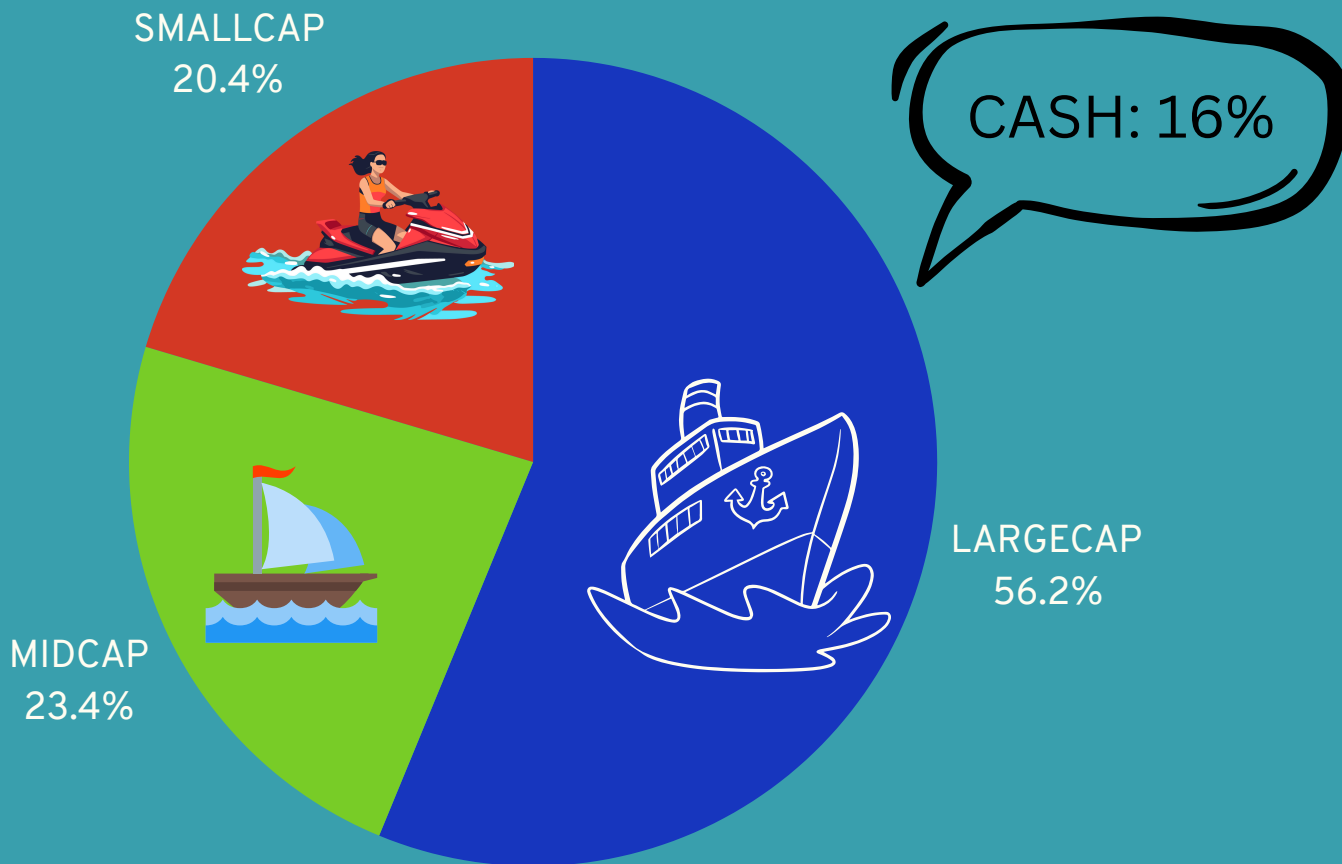
4	3.75
Fast Moving Cor	TOTAL
TATACONSUM	2.00
PATANJALI	0.75
NESTLEIND	0.50
UBL	0.50

2	2.75
UTILITIES	TOTAL
WAAREEENER	2.00
EMSLIMITED	0.75



	2.25
Energy	TOTAL
RELIANCE	2.25

	0.75
Services	TOTAL
INDIGO	0.75



THE MULTICAP PORTFOLIO

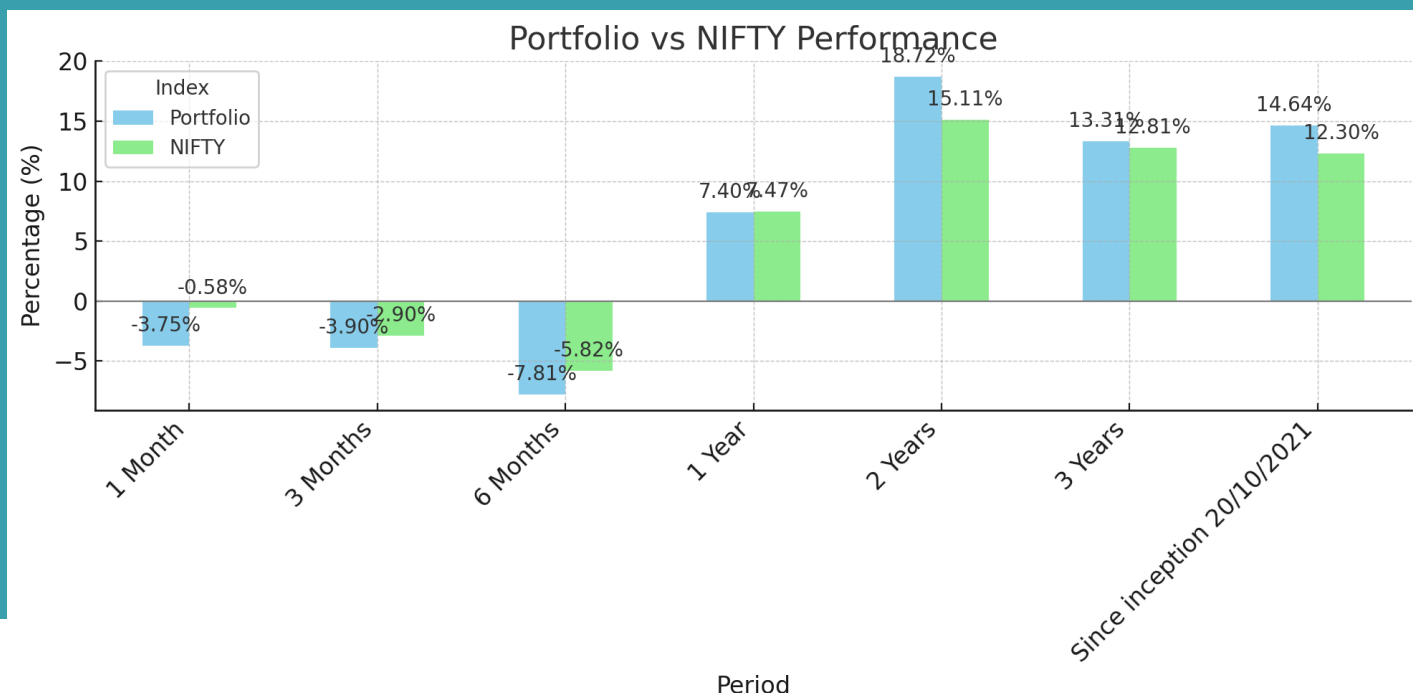
Disclosures:

- Do not copy anyone's Portfolio.
- Just try to understand the significance of the portfolio and can create your own.
- The above explained portfolio is the test example of multicap portfolio named India's Front Runner Fund.

🚀 India's Front Runners Fund vs. NIFTY Performance – Jan 31, 2024

☀️ A Fund That Outshines the Benchmark!

The India's Front Runners Fund has consistently delivered superior returns compared to the NIFTY index, proving itself as a high-performing investment vehicle.



- **SINCE INCEPTION DATE 20/10/2021 14.64 % 12.30 % 15.72 % RETURNS OVER 1 YEAR PERIOD ARE ANNUALIZED.**
- **RETURNS ARE ADJUSTED FOR INFLOWS/OUTFLOWS.**
- **IRR FOR THE BENCHMARK INDEX IS COMPUTED BY SIMULATING PORTFOLIO CASHFLOWS IN TO RESPECTIVE BENCHMARKS.**
- **REPORT DISCLOSURE STATEMENT METHOD :**
- **INTERNAL RATE OF RETURN CONSIDERS RETURNS INCLUDING IMPACT OF TIMING OF MARKET TRANSACTIONS BY SPECIFIC INVESTORS.**
- **DISTRIBUTIONS : DIVIDEND AND INTEREST ARE ASSUMED AS REINVESTED FOR THE RATE OF RETURN**
- **CALCULATION. TAXES : CALCULATIONS ARE ON PRE-TAX BASIS.**
- **FEES : CALCULATIONS ARE AFTER DEDUCTION OF FEES.**



PROFITFROMIT

THE STOCK MARKET TRAINING INSTITUTE.



WWW.PROFITFROMIT.IN

START LEARNING

Toll Free: 18008904317

PMS

Disclaimer

This brochure is based on internal data, publicly available information, and other reliable sources. The information is for general purposes only and should not be construed as investment advice. The brochure does not guarantee completeness or accuracy and disclaims liabilities arising from its use. The stocks and sectors mentioned are for explaining the concept and are not recommendations. Past performance may not be sustained in the future.





CONTACT US:

C. S. Pradhan.

M: 9426536576

cspradhan@profitfromit.in



SEBI Registered

PMS Code: INP000006785



www.profitfromit.in

