

Why Bharat?

GDPs in 2022 (In USD Tn)



India
3.4



China
18.1



The USA
25.5



Europe
17.2

GDPs in 2030 (In USD Tn)



India
7.6 (2.2x)



China
30.3 (1.7x)



The USA
35.0 (1.4x)



Europe
22.2 (1.3x)

GDPs in 2047 (In USD Tn)



India
32 (9.4x)

2x India in 7 years

India will add another
India in next 7 years

*Source: Oxford Economics, Nominal GDP Forecasts, BCG

Portfolio Construction



Portfolio Construction
Stocks Part of NIFTY 500



Asset Allocation

Diversified sectors with weighted positions based on attractiveness



Stock selection

Multi-cap portfolio of ~12-18 securities, with a max 10% allocation per stock



Risk mitigation

Sector diversification, Scuttlebutt analysis & Corporate Governance Checks



Liquidity

Tracking stock liquidity & flexibility for timed trades

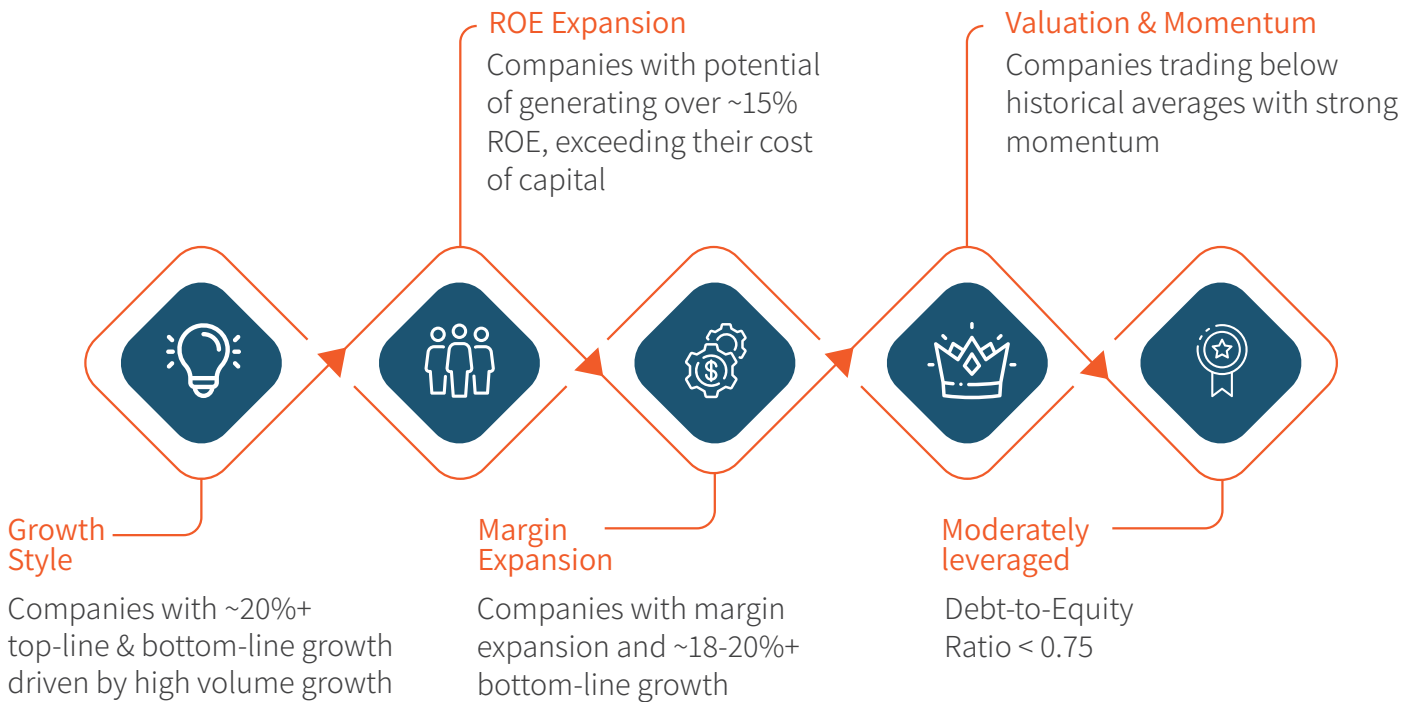


Rebalancing

Rebalancing stock weightages & churning ~3-4 stocks periodically



Key elements of investment philosophy



Subscription Plans

Mode of charging fee	Assets under Advice (AUA) mode
Duration of plan	One (1) Year
The quantum and manner of payment of fees for investment advice rendered	Up to 2.5 percent of AUA per annum
The modalities and periodicity of payment of fees for investment advice rendered	Initial fees to be charged in advance for maximum of two (2) quarters, and subsequently, at the end of every quarter thereof, based on AUA valuation on such date
Minium Initial investment amount committed as Assets under Advice (AUA) (₹)	25,00,000
Investment modes available	Lump Sum & SIP
Taxes applicable	Charged extra