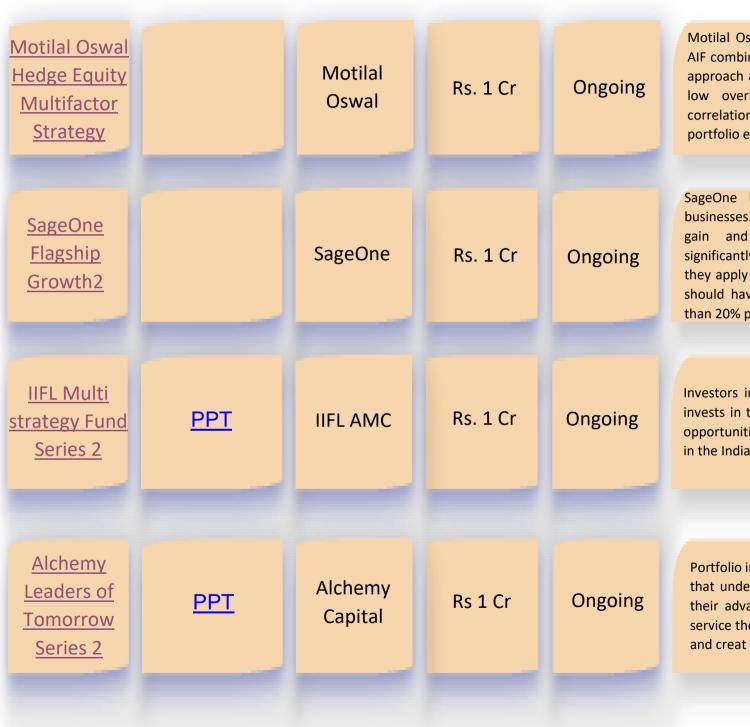


AIF

**IIFL** Investors intending to create a portfolio of such businesses with an established track record which PPT **IIFL AMC Rs. 1 Cr** Ongoing Turnaround have the potential to see a sharp improvement in Strategy fundamentals in the future. Suitable for Investors who intend to invest in Renaissance portfolio while focuses on recovery on Indian PPT Ongoing Rs. 1 Cr Renaissance economy which slowed down sharply during 2016-18 Next India due to disruptive reforms like demonitisation, RERA, Fund II IBC and GST. A disloaction exists in the credit markets as existing **ICICI Pru** lenders have become risk averse and are focused on ICICI lending to higher rated corporates and expanding **PPT** Corporate Rs. 1 Cr Ongoing retail lending business. Investors must look forward **Prudential Credit Fund** to investing in structured credit asset class which is expected to grow to \$100 bn in next 5 years. An open-ended multi-cap fund with investments in Sundaram large, mid and small-cap stocks with the objective of White Rs. 1 Cr Ongoing seeking long term capital appreciation. Atlas offers an Oak ATLAS opportunity to participate in opportunities in multiple sectors and across cap curve.



Motilal Oswal Hedged Equity Multifactor Strategy AIF combines a multifactor, model-driven investing approach along with tail-hedging. This scheme has low overlap with Nifty50 companies and a correlation of 65-70% leading differentiated portfolio exposure.

SageOne believes in investing in high-growth businesses. They trace and track companies that gain and hold market share, contributing significantly to their earnings growth. The criteria they apply while selecting these businesses is they should have long-term growth potential of more than 20% per annum and 25% at the portfolio level.

Investors intending to invest in a portfolio which invests in two funds targeting to benefit from the opportunities available in the late-stage tech space in the Indian internet economy.

Portfolio invests in leaders of tomorrow companies that understand the role of technology, adapt to their advantage, shape consumer behaviour and service them better, build a leaner business model and creat MOAT and manage their risks better.

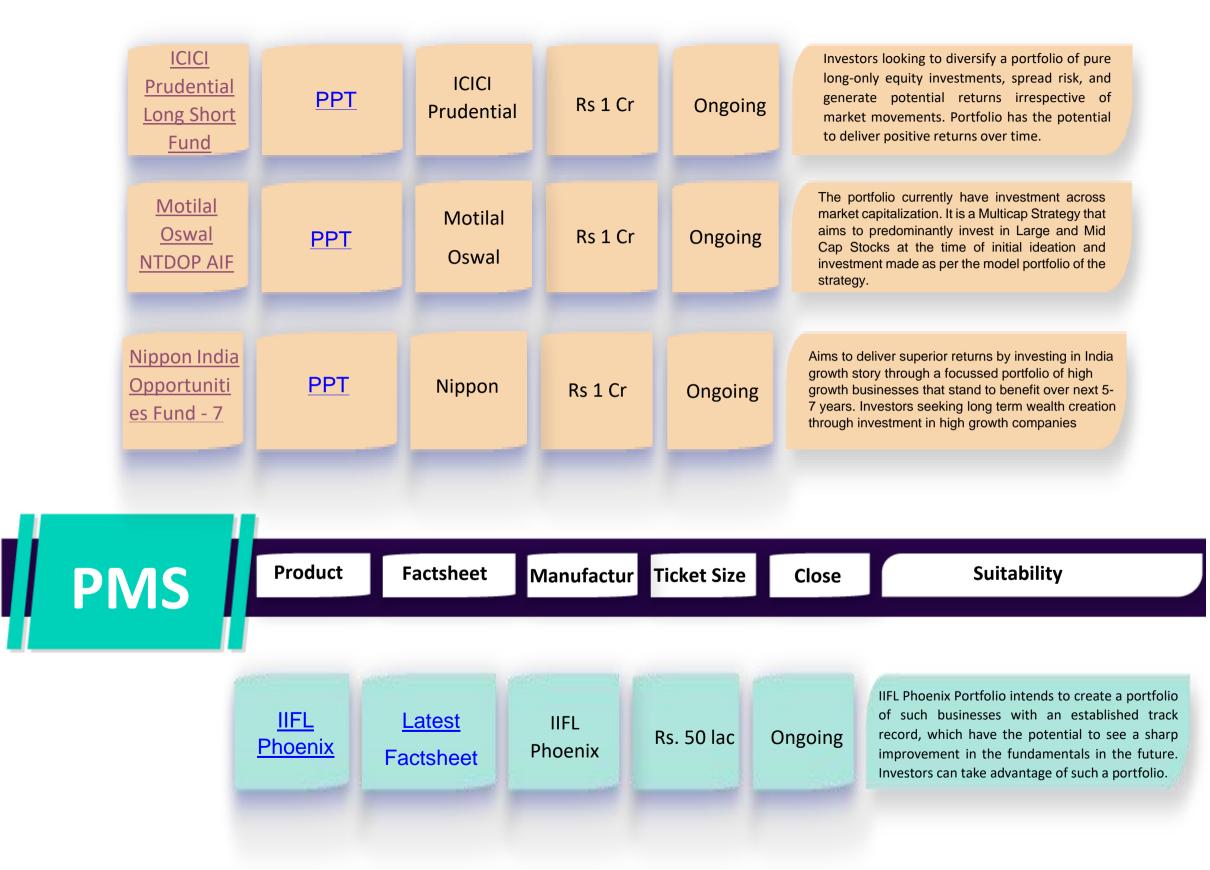


Investors looking to invest in portfolio consisting of investing in Mid-to-late-stage deals, Segment leaders, profitable companies and companies with prior institutional backing. Investment will be preferrably in the sectors of finance, consumption and healthcare.

Investors intending to grab opportunities due to change in the management of the companies, private equity acquiring majority stake in listed entity, Fundamentally sound IPO's having modest debut, inorganic acquisition by listed companies and so on.

Investors intending to invest in portfolio that harnesses Mid-sized, quality ,growing, long term relevant and reasonable valued businesses.

Investment Objective is that outsized returns should be earned over time by investing in great businesses. And, a great business is one that is well managed, growing, scalable, and generates superior returns on incremental capital. A bottom-up stock selection based Philosophy is followed which intends to buy great businesses at attractive values. The motto is to invest in businesses, not to bet on macros as the firm believes that macros are for entertainment, so, watch them, but focus on Micros i.e. the underlying portfolio companies in terms of business earnings, and valuations- this is where White Oak's Team keeps its focus.





Investors looking for generating long term capital appreciation for investors from a portfolio of equity and equity related securities can opt for this PMS. The investment strategy is to invest in companies and in sectors that are available at significant discount to their intrinsic value and provide earnings visibility.

The investment objective of the Abakkus All Cap Approach would be to generate alpha and risk adjusted returns for client by investing in benchmark agnostic multicap portfolio. Investors can take advantage of such portfolios.

The portfolio aims to ensure balanced portfolio of selected companies agnostic to benchmark, focus on ensuring alpha generation is a function of stock selection, consciously avoid market timing or sector rotation or other such top-down bets. Investor looking for a disciplined portfolio can go for it.

Investors intending to invest in quality businesses that can deliver sustainable high growth over medium term to long term. Superior quality businesses as demonstrated by Competitive edge, Pricing power, ROE, FCF. Good quality and competent management teams



Investors willing to invest in "Scalable" Companies with potential to transition from Midcap to Large cap & Small-cap to Mid-cap.

Investors looking for portfolio with superior returns by investing in stocks from sectors that can benefit from India's emerging businesses. It aims to predominantly invest in Small and Midcap stocks with a focus on identifying potential winners. Focus on Sectors and Companies which promise a higher than average growth.

Investors aiming to generate long term capital appreciation by investing in a focused portfolio of high growth stocks having the potential to grow more than the nominal GDP for next 5-7 years across market capitalization and which are available at reasonable market prices.

"Investors intending to invest in portfolio that delivers superior returns by investing in stocks from sectors that can benefit from the Next Trillion Dollar GDP growth. It aims to invest in stocks across market capitalisation with a focus on identifying potential winners that would participate in successive phases of GDP growth."



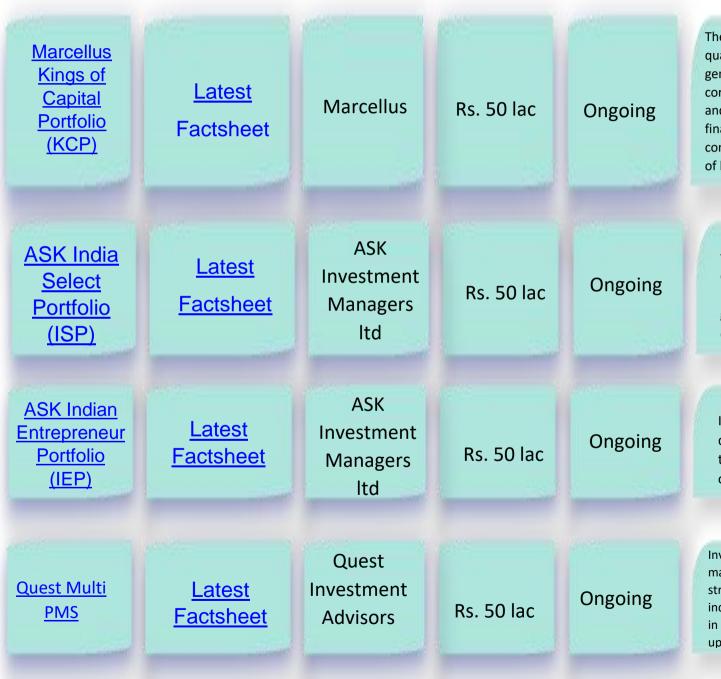
Investors aiming to benefit from the long term compounding effect on investments done in good businesses, run by great business managers for superior wealth creation.

Investors looking to invest in companies across the market capitalization range, which have high growth potential and potential to deliver long-term capital appreciation. Since portfolio is concentrated, focus is more on stock selection than on market cap allocation

Investors aiming to generate long-term returns by investing in equities and equity related instruments, across all market capitalizations with a mid cap bias. Portfolio believes that consistent and superior long-term absolute returns can be made across market cycles by investing in growth companies with good management teams.

"Investors wanting to generate long-term returns by investing in Large-Cap equities. The philosophy behind this portfolio is to invest in growth companies, which have achieved scale and have reached or have potential to be amongst the leaders in their field/industry segments. Typically, these companies would have experience of operating through good-bad business cycles."

Portfolio invests in businesses with clean financial accounts, companies with track record of superior capital allocation, Amongst companies which pass steps 1 & 2, identify those with high barriers to entry.

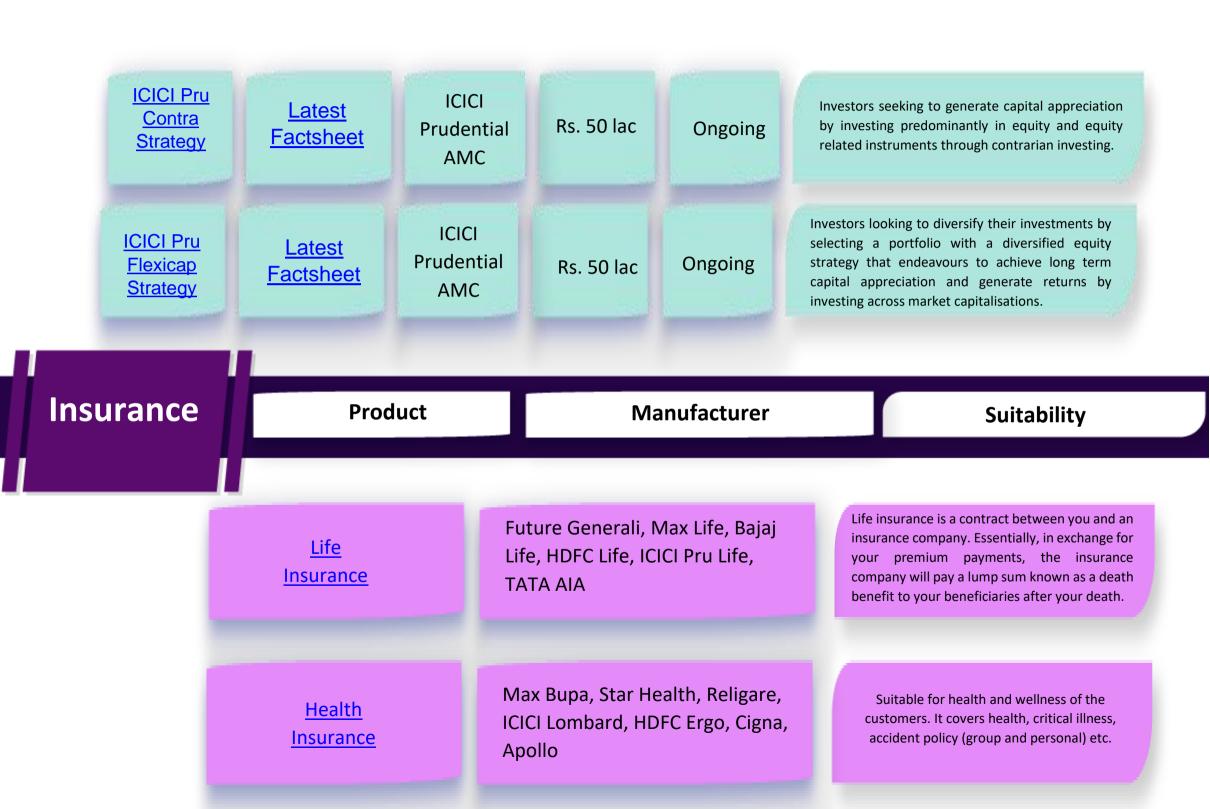


The key objective of the portfolio is to own 10 to 14 high quality financial companies (banks, NBFCs, life insurers, general insurers, asset managers, brokers) that have good corporate governance, prudent capital allocation skills and high barriers to entry. By owning these high quality financial companies, investors can benefit from the consolidation in the lending sector and the financialization of household savings over the next decade.

Investors aiming to invest portfolio with best ideas from business attributes like size of opportunity, size of pond vs. size of fish, quality of business, superior ROCE, key pivot of strong wealth creation, earnings growth, quantum, consistency and durability of earnings, price-value gap or margin of safety.

Investors intending to invest in entrepreneurially driven and/or family-owned businesses listed on the Indian stock markets, for compounding gains over the medium to long term.

Investors looking for portfolio that invests in sector and market-cap agnostic looking for outsized upside potential, strong leadership position in its domain and within the industry, with strong pricing power and not a 'me too' player in the industry and companies with strong ROE which are upward trending and steady or growing margins



| utual Fund         | Product | Manufac           | turer   | Suitability   |
|--------------------|---------|-------------------|---|---|
| Equity Mutual Fund |         | <u>Invest Now</u> | and looking for high  | oking to invest money for at least 3-4 years<br>returns. At the same time, these investors<br>ly for possibility of moderate losses in their  |
| Hybird Mutual Fund |         | <u>Invest Now</u> | prefer to take se<br>other Equity fund<br>also be ready for | ve advanced knowledge of macro trends and<br>ective bets for higher returns compared to<br>s. At the same time, these investors should<br>possibility of moderate to high losses in their<br>though overall market is performing better.          |
| Debt Mutual Funds  |         | <u>Invest Now</u> | prefer to take se<br>other Equity fund<br>also be ready for | ve advanced knowledge of macro trends and<br>lective bets for higher returns compared to<br>s. At the same time, these investors should<br>possibility of moderate to high losses in their<br>though overall market is performing better.         |
| NFO                |         | <u>Invest Now</u> | invest for the give<br>fund on the basis<br>However one sho | d at absolute price in which an investor can<br>en time which is suitable for sector specific<br>of high, mid and low risk taking category.<br>uld not just consider the absolute price while<br>on of investing in the NFO which has a<br>period |

| Category  | Product                | Suitability  |  |
|-----------|------------------------|--|--|
| Bonds     | Bonds                  | Bonds are an excellent choice for investors looking for a fixed<br>but higher income from a safe option. Bonds are a low-risk<br>investment vehicle when compared to debt funds as it<br>ensures Capital Protection  |  |
| Stocks    | <u>IIFL Securities</u> | Stocks are ideal for long-term investments. Also, you need to<br>understand that the returns are not guaranteed and be willing<br>to assume the associated risks   |  |
| US Stocks | <u>Stockal</u>         | "One big advantage of putting money into US markets is that it<br>gives access to investors to deploy money in companies that<br>have a global presence. At the same time, these investors<br>should also be ready for possibility of moderate losses in their<br>investments.                               |  |
| Loan      | <u>Home Loan</u>       | Loans are advanced for a number of reasons including major<br>purchases, investing, renovations, debt consolidation, and<br>business ventures. With compounding, the interest owed is<br>higher than that of the simple interest method because interest<br>is charged monthly on the principal loan amount. |  |

## To know the product offering of FINTOO Invest <u>Click Here</u>

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