SEBI-Registered PMS Distributor

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Equity Math

SHIFT THE BURDEN OF MANAGING YOUR PORTFOLIO OF LISTED EQUITIES TO US.

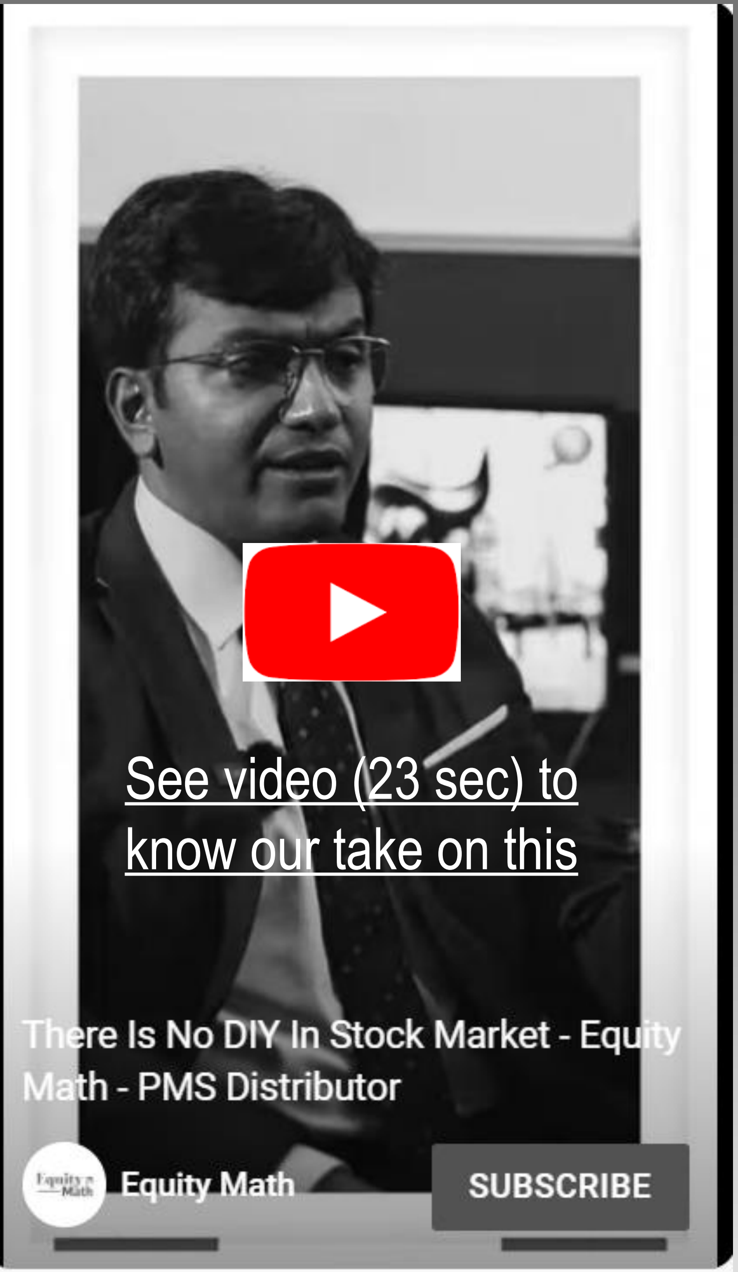
WHY EQUITY MATH.. ? WHAT IT BRINGS TO THE TABLE.. ?

1) Framework for building conviction on the Portfolio Manager (PM) before selecting one
2) Shortlisted one PM for each category – large, mid, multi and thematic, using scuttlebutt approach
3) Special focus on NRIs and regular travel to those geographies for in-person meetings
4) Cost neutral to our Clients / Investors
5) Perform on-demand CRM
6) In day-to-day touch with all PMs we represent
7) Help clients time the market, especially during down market to hold on and do follow-on buying
8) Periodic review of Portfolio for those clients who prefer a hands-on approach
9) All the above functions performed by seasoned professionals at Equity Math

WHO IS SPEARHEADING EQUITY MATH.. ?

1) Shshank is a graduate from Narsee Monjee College, Mumbai and post-graduate from NMIMS, Mumbai.
2) He is well networked across market intermediaries and has 14 years of exposure to Indian equities, starting as research analyst to moving into sales and CRM
   a) c.3 years work experience as a Sales and CRM director with a sebi-registered PM (Care Portfolio Managers)
   b) c.7 years work experience in managing broking relationships with focus on delivery based investment and trading
   c) c.4 years work experience in research support to proprietary trading and investment desks
3) Current clientele consists primarily of individuals (resident and NRIs) and a few corporates
4) Focused on distant gratification -- no upfront fees, no set-up nor consultation fees

Shshank Mehta, Founder, Equity Math



THERE IS NO DO-IT-YOURSELF (DIY) IN STOCK MARKET

APPOINT A SEBI-REGISTERED PM AND FOCUS ON YOUR OWN BUSINESS & PROFESSION..

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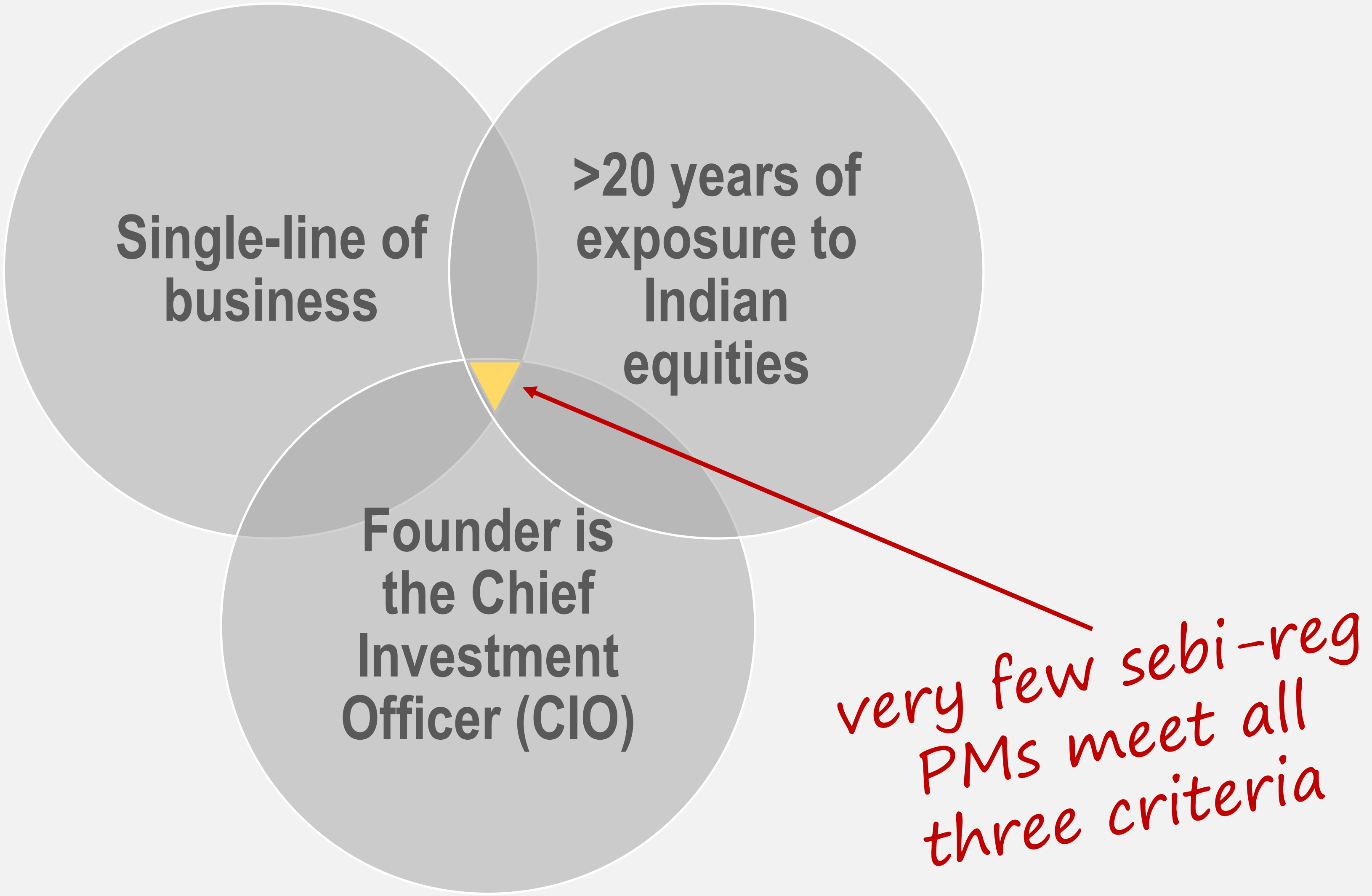
HOW HAVE WE SHORTLISTED PMs WE REPRESENT.. ?



WE SHORTLISTED 1 PM IN EACH CATEGORY

LARGE-CAP	MULTI-CAP
MID-CAP	THEMATIC

4 EXCEPTIONAL CRAFTSMEN.. -- 1 PM IN EACH CATEGORY

Rajesh Kothari

ALFACCURATE ADVISORS

Most diversified PMS in India (48-50 stocks). Invests in leaders of oligopolies, provided their annual profits are >₹100 cr. PM has 26 years exposure to Indian Equities.

Ravi Dharamshi

VALUEQUEST
Powered by Ideas. Driven by Values.

Concentrated cap agnostic portfolio (8-12 stocks). Invests in companies about to change scale, provided their annual profits are >₹100 cr. PM has 21 years exposure to Indian Equities.

Miten Mehta

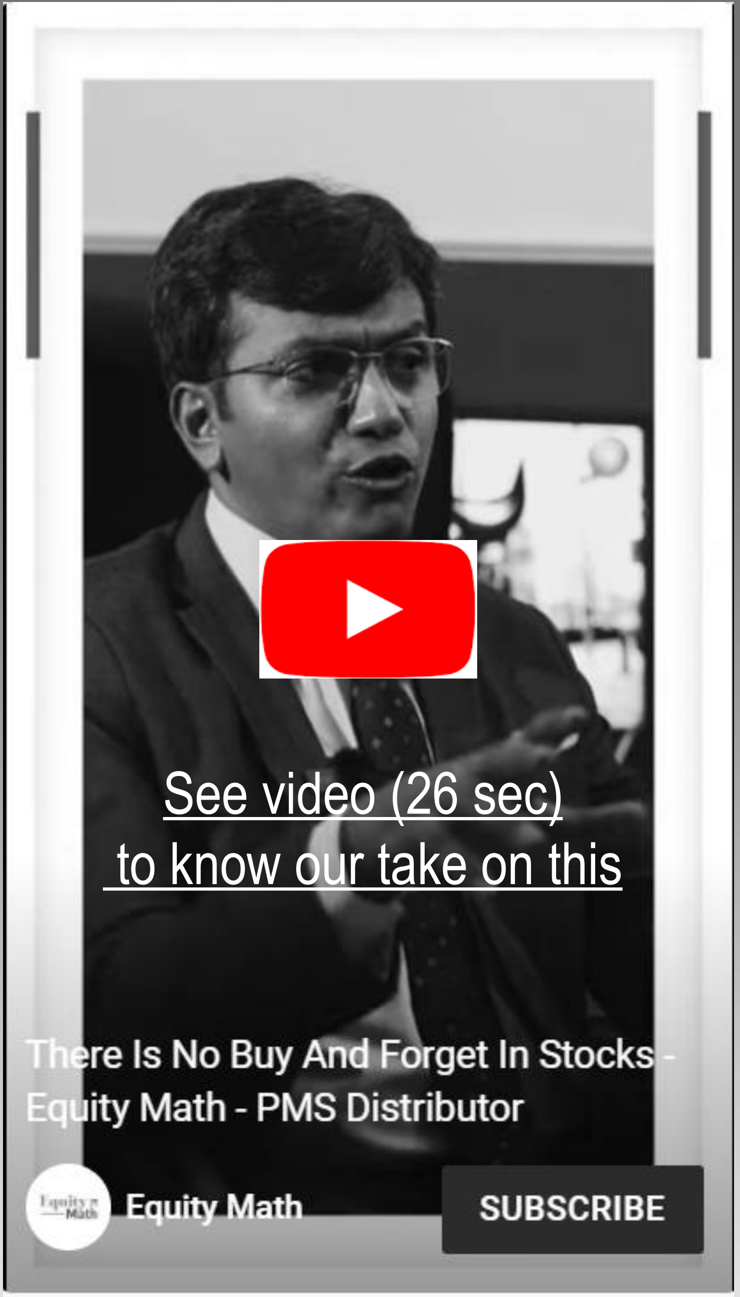
BELLWETHER
Valuing Tomorrow

Concentrated portfolio (10-12 stocks) today's mid-caps tomorrow's large-caps. Invests in company managements for their vision and execution ability. PM has 32 years exposure to Indian Equities.

Hemant Patel

ALDER CAPITAL

B2C consumption portfolio (16-18 stocks). Invests in B2C companies into 3 baskets – consumer staples, consumer discretionary and branded businesses. PM has 21 years exposure to Indian Equities.



THERE IS NO BUY AND FORGET IN THIS NEO-WORLD..

THERE IS, RATHER AN APPOINT AND FORGET..

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THE SAFEST PMS IN INDIA, WITH THE HIGHEST RISK-ADJUSTED RETURNS

Rajesh Kothari

ALFACCURATE ADVISORS

Dimensions to be considered:

1) 26 years of exposure to India equities
2) Risk management – primary focus
3) 45-48 stock portfolio
4) Focus on risk-adjusted returns
5) Minimum 60% exposure to large Cap
6) Invest only in Leaders in Oligopolies, provided annual profit is >₹100 cr
7) Portfolio skewed towards Growth stocks

Comparable to a MF with no burden of selecting one.

CONCENTRATED APPROACH, ON TODAY'S MID-CAP TOMORROW'S LARGE-CAPS

Miten Mehta

BELLWETHER
Valuing Tomorrow

Dimensions to be considered:

1) 32 years of exposure to India equities
2) Investment boutique with the scalability and expertise of a major investment house (600 cos. under coverage)
3) 10-14 stock portfolio
4) Focus on performance with lower drawdowns
5) Flexi cap with a skew towards mid and large cap
6) Co. management's execution ability is key
7) Bridge gap between investment objective and risk profile via custom portfolios

invests in Co. managements of listed equity, banking on their vision and execution ability

CONCENTRATED APPROACH, CAP AGNOSTIC, COS. ABOUT TO CHANGE SCALE

Ravi Dharamshi

VALUEQUEST

Powered by Ideas.
Driven by Values.

Dimensions to be considered:

1) 21 years of exposure to India equities
2) Mentored by likes of Rakesh Jhunjhunwala sir
3) 8-12 stock portfolio
4) Focus on absolute size of the opportunity
5) Exposure to small, mid and large Cap
6) Invest only when companies are about to change scale
7) Annual profit of Cos, should be > ₹100 cr
8) Portfolio skewed towards growth stocks

multi-cap concentrated portfolio of cos about to change scale and have annual profit of >₹100 cr p.a.

THE MOST RATIONALE WAY TO PARTICIPATE IN INDIA CONSUMPTION STORY

Hemant Patel

ALDER CAPITAL

Dimensions to be considered:

1) 21 years of exposure to India equities
2) 18-20 stock portfolio; 20% portfolio into consumer tech
3) Focus sub-sectors within the consumption theme
4) Exposure to small, mid and large Cap
5) Invest only in consumption cos. from a list super 70 companies based on proprietary research
6) The only PMS in India focused solely on B2C consumption businesses

investment into 3 baskets – consumer staples, consumer discretionary and branded B2C businesses

To See video click here

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FULL INTERVIEW
VALUEQUEST PMS
INVEST IN CONCENTRATED PORTFOLIO OF COS. ABOUT TO CHANGE SCALE.
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BELLWETHER CAPITAL
CONCENTRATED PORTFOLIO, OF TODAY'S MID-CAP; TOMORROW'S LARGE-CAP.
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WANT TO OWN THE RIGHT BUSINESSES..

APPOINTING A PM, WILL ONLY IMPROVE THE ODDS..

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ANNEXURE

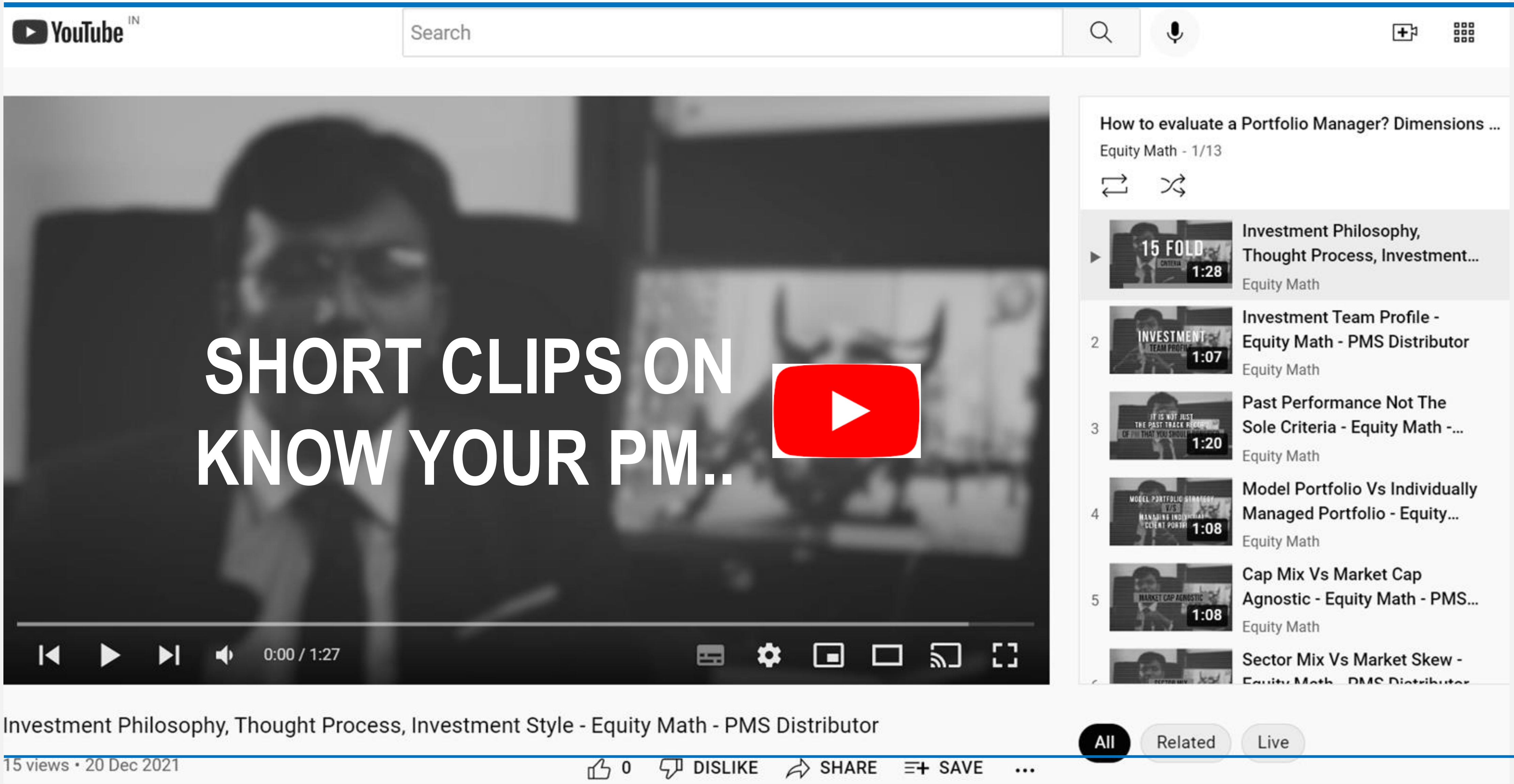
Q 1: WHAT DIMENSIONS NEED TO BE CONSIDERED BEFORE APPOINTING A PM.. ?

Q 2: WHAT AN INCOMING CLIENT/INVESTOR NEEDS TO KNOW AND UNDERSTAND ABOUT HIMSELF.. ?

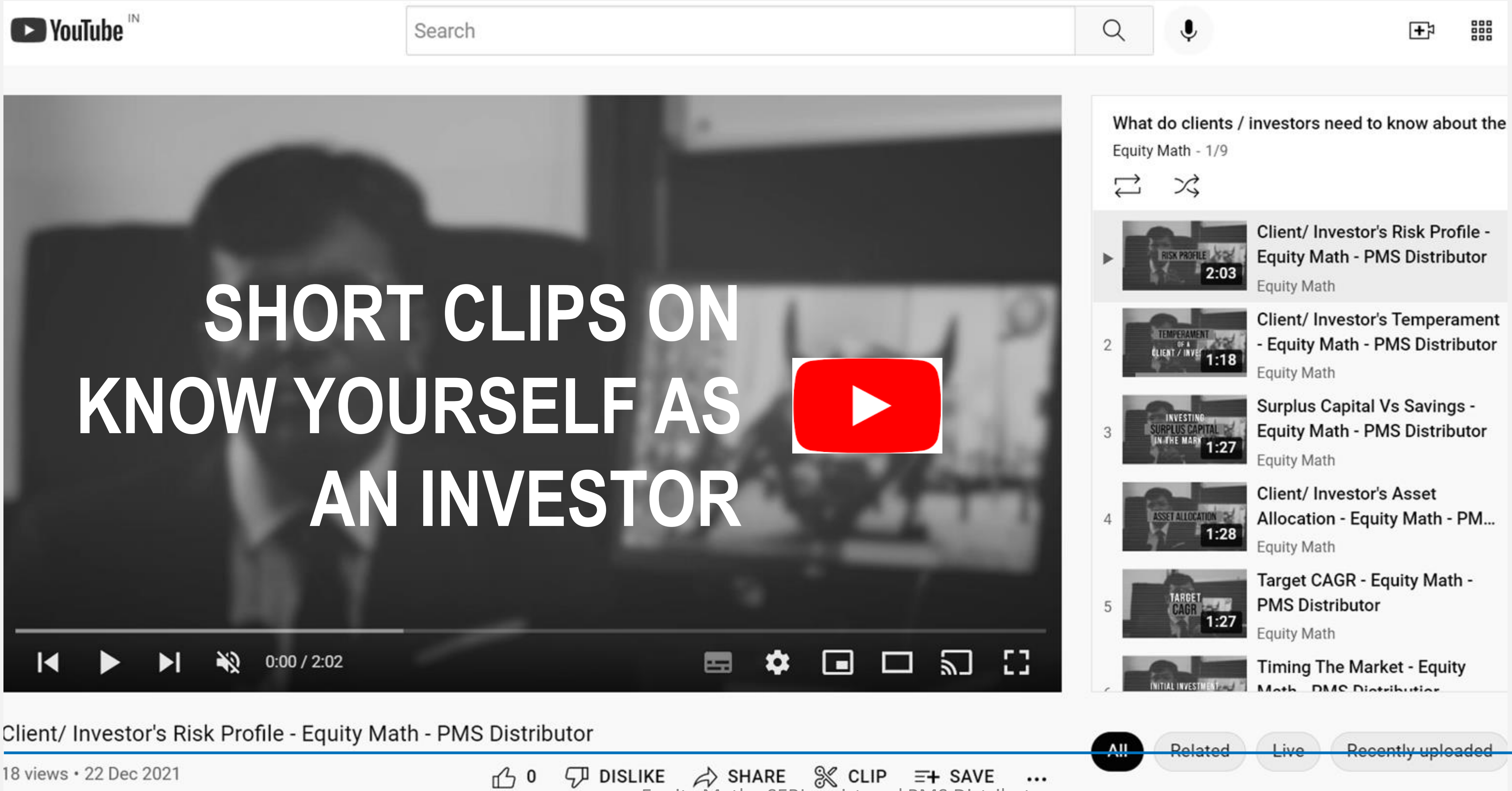
Q 3: HOW CLIENTS APPOINT PORTFOLIO MANGER TODAY.. ?

Q 4: WHY DO YOU NEED TO HAVE CONVICTION ON THE PM.. ?

Q 1: WHAT DIMENSIONS NEED TO BE CONSIDERED BEFORE APPOINTING A PM.. ?



Q 2: WHAT AN INCOMING CLIENT/INVESTOR NEEDS TO KNOW AND UNDERSTAND ABOUT HIMSELF.. ?



Q 3: HOW CLIENTS APPOINT PORTFOLIO MANGER TODAY.. ?

Past Performance

Brand

Word of Mouth

Problem?

'No CONVICTION on the PM'

Q 4: WHY DO YOU NEED TO HAVE CONVICTION ON THE PM.. ?

2 reasons:

(i) longevity in the relationship;

(ii) follow-on buying..

Conviction on the portfolio manager is the cornerstone of client – PM relationship

WE ARE HAPPY TO CONNECT OVER A CALL OR MEET IN-PERSON..

Thank you!

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