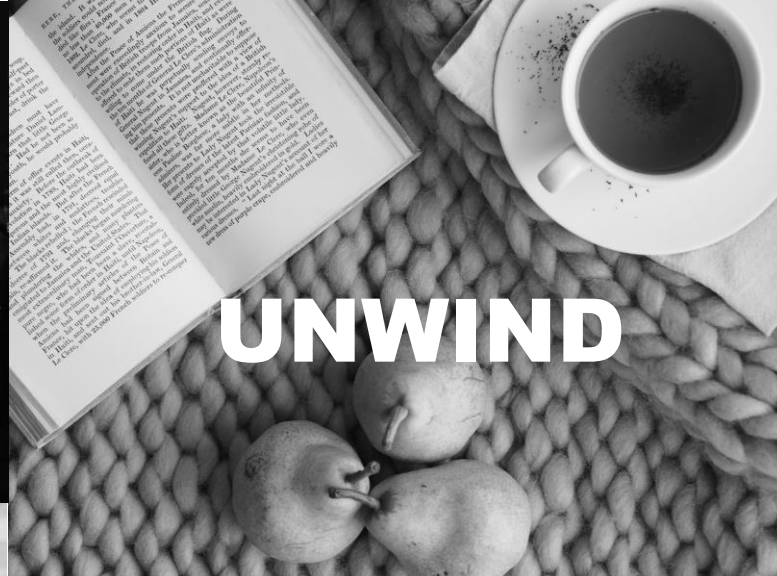




EASE



UNWIND



RELAX

**Equity π
— Math**



ENJOY



TRAVEL



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**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..



See video (23 sec) to
know our take on this

There Is No DIY In Stock Market - Equity
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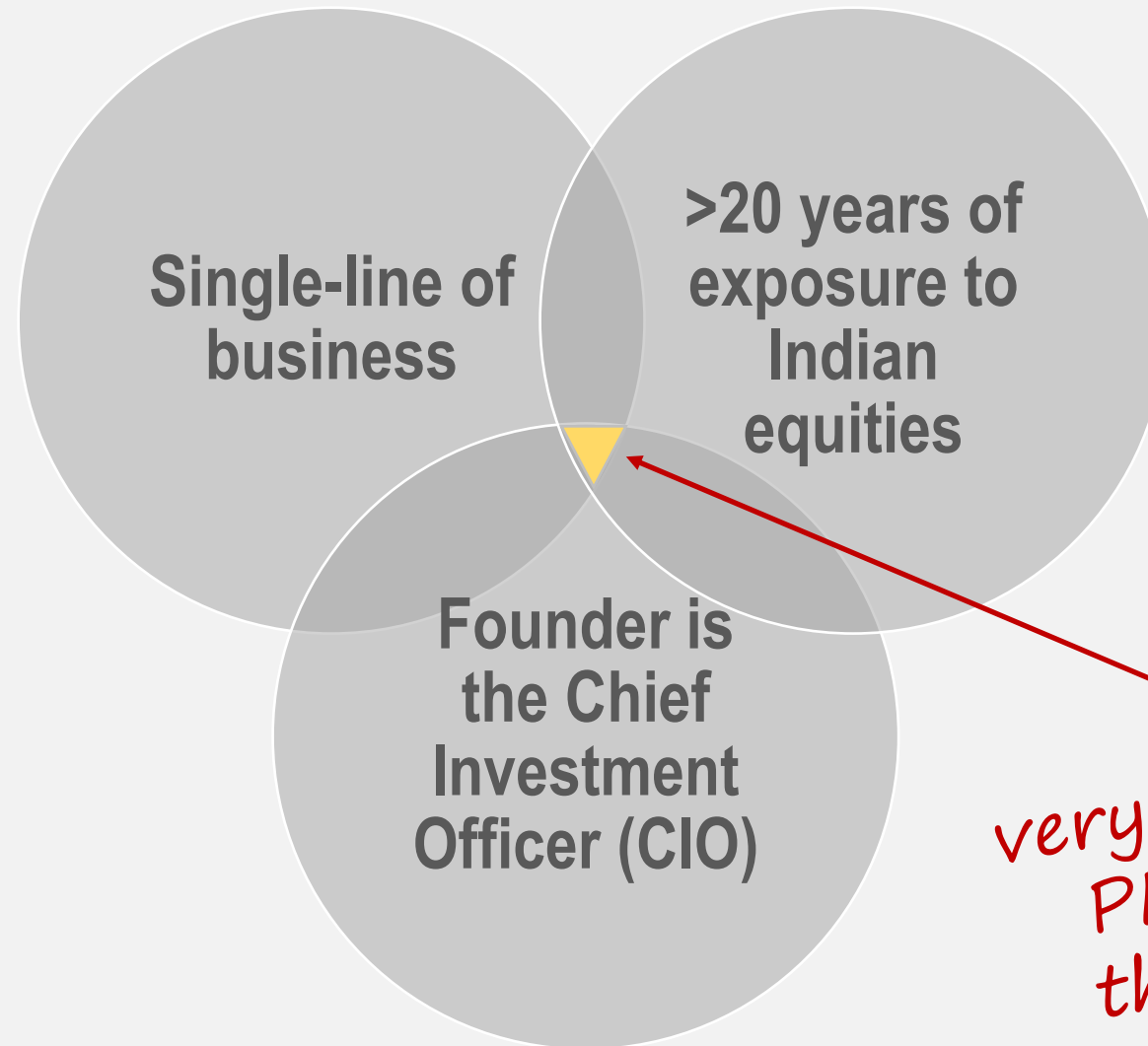
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HOW HAVE WE SHORTLISTED PMs WE REPRESENT.. ?



*very few sebi-reg
PMs meet all
three criteria*

WE SHORTLISTED 1 PM IN EACH CATEGORY

LARGE-CAP

MULTI-CAP

MID-CAP

THEMATIC

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



Rajesh Kothari



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



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



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..



See video (26 sec)
to know our take on this

There Is No Buy And Forget In Stocks -
Equity Math - PMS Distributor



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

Rajesh Kothari



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



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.



VALUEQUEST

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Driven by Values.

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

FULL INTERVIEW

ALDER CAPITAL PMS

INDIA CONSUMPTION STORY AND CONSUMER TECH

[To See video click here](#)



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FULL INTERVIEW

VALUEQUEST PMS

[To See video click here](#)



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.**

[Click here to
view website](#)



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FULL INTERVIEW

ALFACCURATE ADVISORS PMS

BUILDING WEALTH BY OWNING LEADERS IN OLIGOPOLIES

[To See video click here](#)



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WANT TO OWN THE RIGHT BUSINESSES..

APPOINTING A PM, WILL ONLY IMPROVE THE ODDS..



See video (30 sec) to
know our take on this

Wealth Creation - Equity Math - PMS
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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.. ?

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Q

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📺

SHORT CLIPS ON
KNOW YOUR PM..



⏮️ ⏪ ⏩ ⏭ 🔊 0:00 / 1:27

📄 ⚙️ 🖥️ 📱 📶 🗑️

Investment Philosophy, Thought Process, Investment Style - Equity Math - PMS Distributor

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How to evaluate a Portfolio Manager? Dimensions ...
Equity Math - 1/13

↔️ ↻


▶️



15 FOLD
CRITERIA
1:28

Investment Philosophy, Thought Process, Investment...
Equity Math


2



INVESTMENT
TEAM PROFILE
1:07

Investment Team Profile - Equity Math - PMS Distributor
Equity Math


3



IT IS NOT JUST
THE PAST TRACK RECORD
OF PM THAT YOU SHOULD
1:20

Past Performance Not The Sole Criteria - Equity Math - ...
Equity Math


4



MODEL PORTFOLIO STRATEGY
VS
MANAGING INDIVIDUALLY
CURRENT PORTFOLIO
1:08


Model Portfolio Vs Individually Managed Portfolio - Equity...
Equity Math

5



MARKET CAP AGENOSTIC
1:08

Cap Mix Vs Market Cap Agnostic - Equity Math - PMS...
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SECTOR MIX VS MARKET SKEW
1:08






Sector Mix Vs Market Skew - Equity Math - PMS Distributor


All

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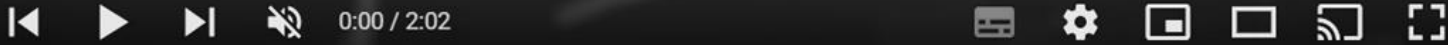
Live

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













0:00 / 2:02



What do clients / investors need to know about the Equity Math - 1/9






 

-  Client/ Investor's Risk Profile - Equity Math - PMS Distributor
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2:03
-  Client/ Investor's Temperament - Equity Math - PMS Distributor
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-  Surplus Capital Vs Savings - Equity Math - PMS Distributor
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-  Client/ Investor's Asset Allocation - Equity Math - PM...
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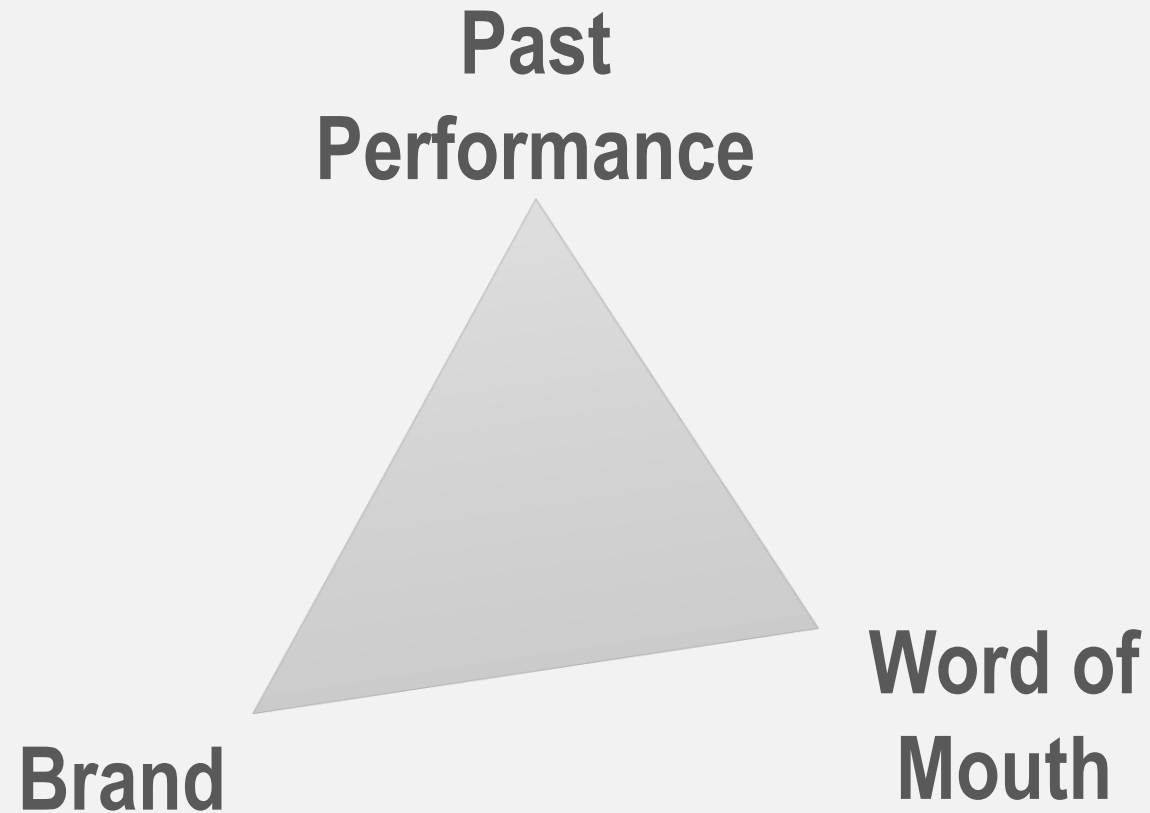
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Q 3: HOW CLIENTS APPOINT PORTFOLIO MANGER TODAY.. ?



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!

Contact:

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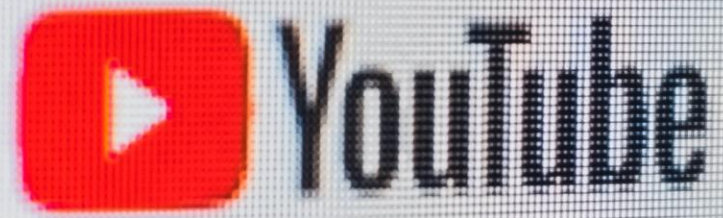
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