



**UNWIND**



**TRAVEL**



**RELAX**



**ENJOY**



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

# Equity $\nabla$ — Math

SEBI-Registered PMS Distributor  
[equitymath.in](http://equitymath.in)



**Important Note:** For the end client, whether he goes to the PM directly or via Equity Math the PMS fees remain the same.

# OUR THOUGHT PROCESS..

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Clients / investors are currently appointing Portfolio Manager (PM) by brand, word of mouth or past performance. There is little focus on building conviction on the PM. This is needed for (a) longevity in the tenure of client-PM relationship; and (b) follow-on buying.

Equity Math has designed a framework where focus is on building conviction on the PM as a precedent to appointing him to take buy and sell decisions. So clients / investors don't lose 2-3 years in judging the PM for every action he takes -- rather they do follow-on buying (at the direction of the PM) and hold on. Eventually, this thought process of conviction-based PM appointment will lead to alpha generation.



**Shshank Mehta, Founder, Equity Math**

# WHAT DOES EQUITY MATH BRING TO THE TABLE.. ?

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- 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



**Important Note:** For the end client, whether he goes to the PM directly or via Equity Math the PMS fees remain the same.

# WE WILL BE WITH YOU THROUGH THE JOURNEY..

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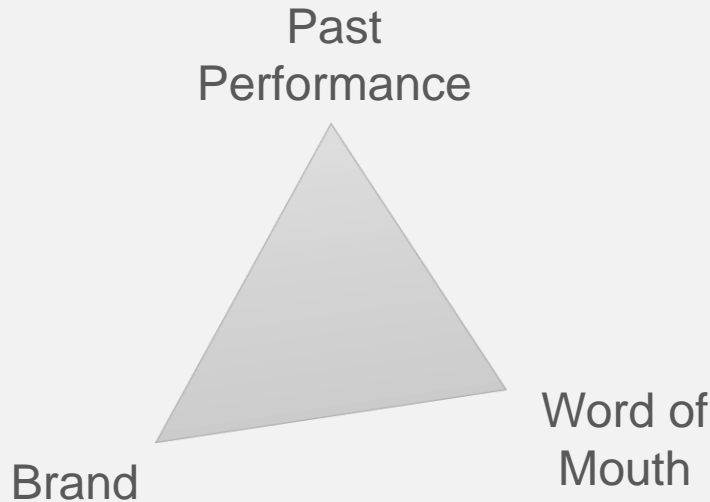


**Important Note:** There is no upfront commission on Sales. Our gratification depends on longevity of client-PM relationship and performance of the portfolio. Therefore, our focus is more on CRM post-sales.

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# HOW CLIENTS APPOINT PORTFOLIO MANGER TODAY..

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*Problem no. 1*

*'No CONVICTION on the PM'*

*Problem no. 2*

*'No RESONANCE between temperament of client and strategy of PM'*

# EQUITY MATH'S FRAMEWORK HELPS CLIENTS SELECT THE RIGHT PORTFOLIO MANAGER

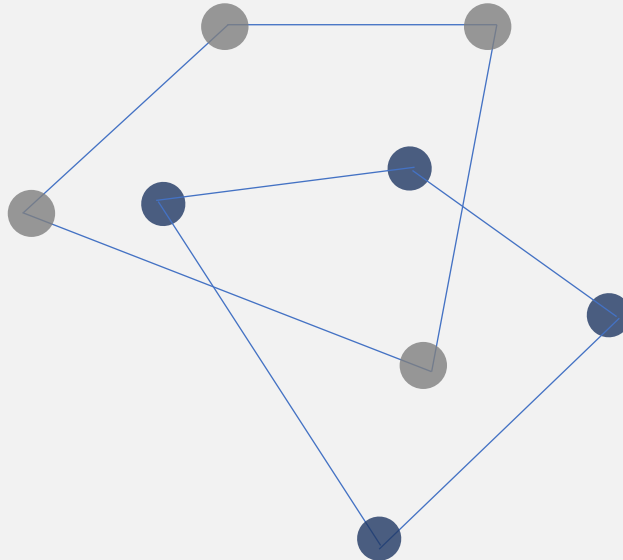
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## CONVICTION

DIMENSIONS YOU NEED  
TO KNOW BEFORE  
APPOINTING A  
PORTFOLIO MANAGER..



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## RESONANCE

DISCOVER YOUR  
OWN TRAITS AND  
TEMEPERAMENT AS  
AN INVESTOR



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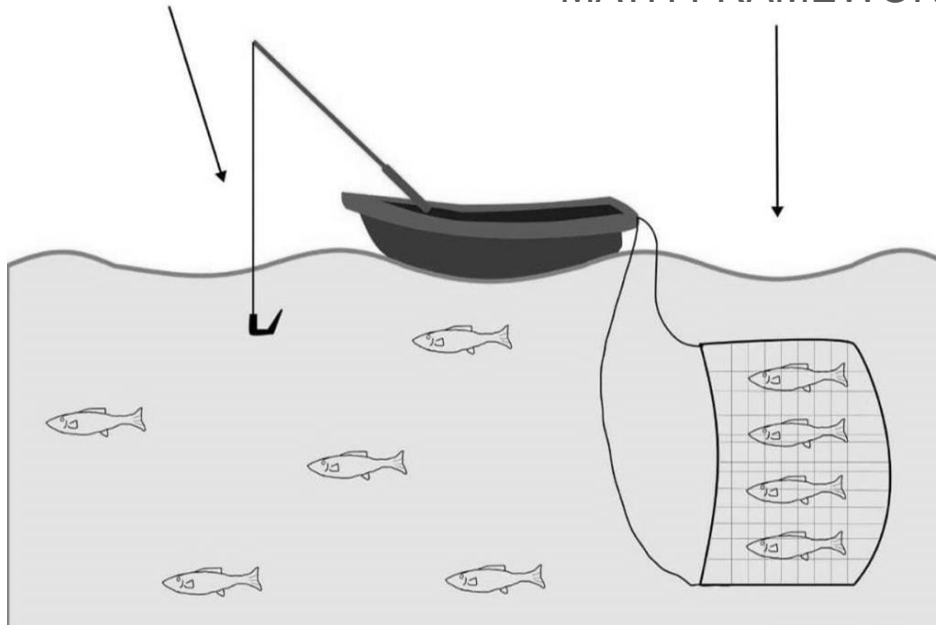


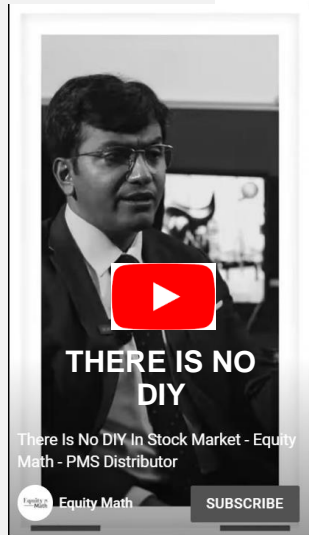
# CONVICTION >> FOLLOW-ON BUYING, ALPHA GENERATION RESONANCE >> LONGEVITY OF CLIENT-PM RELATIONSHIP

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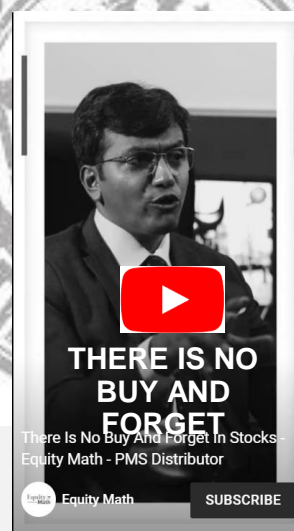
WITHOUT A SEBI-  
REGISTERED PM

APPOINT A PM  
USING EQUITY  
MATH FRAMEWORK

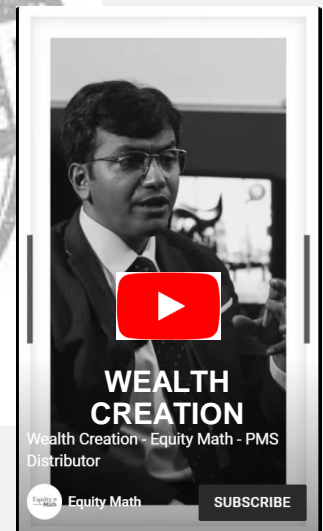




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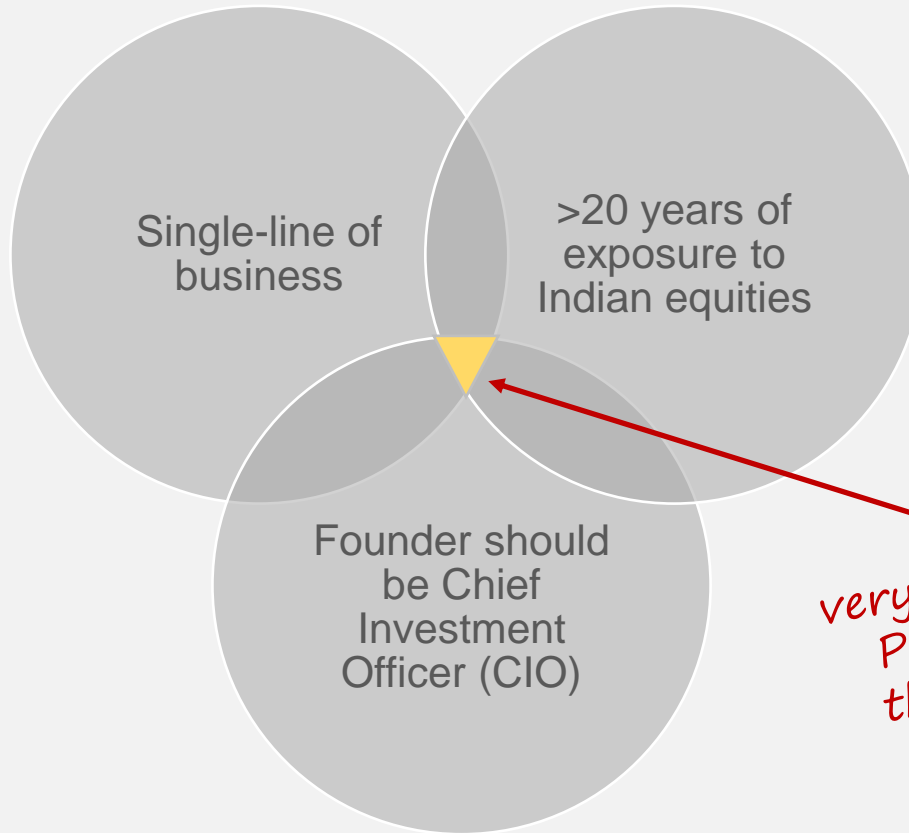
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# HOW HAVE WE SHORTLISTED PMs WE REPRESENT.. ?

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

# WE HAVE SHORTLISTED 1 PM IN EACH CATEGORY

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## LARGE-CAP

*Top 100 companies when you rank all listed equities in descending order of their market cap*

## MULTI-CAP

*Any company but usually top 500 companies when you list all listed equities in descending order of their market cap*

## MID-CAP

*Companies rankings 101 to 250 in terms of market capitalization are known as mid-cap companies.*

## THEMATIC

*Stocks tied to a theme, more broad-based than sectoral, companies and sectors united by an idea*

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



**ALFAccurate ADVISORS**



**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.



**VALUEQUEST**

*Powered by Ideas.  
Driven by Values.*



**Ravi Dharamshi**

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.

**BELLWETHER**

*Valuing Tomorrow*



**Miten Mehta**

Concentrated portfolio (10-14 stocks) that are today's mid-caps; tomorrow's large-caps. Focus is on company managements for their vision and execution ability. PM has 32 years exposure to Indian Equities.

**ALDER  
CAPITAL**



**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.

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

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Rajesh Kothari



Dimensions to be considered:

- 1) 26 years of exposure to India equities
- 2) Risk management – primary focus
- 3) 48-50 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 PORTFOLIO, TODAY'S MID-CAP TOMORROW'S LARGE-CAPS

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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
- 3) 10-14 stock portfolio
- 4) Flexi cap with a skew towards mid and large cap
- 5) Co. management's execution ability is key
- 6) Bridge gap between investment objective and risk profile via custom portfolios

*Emphasis on company's  
management, banking on their  
vision and execution ability*

# CONCENTRATED PORTFOLIO, CAP AGNOSTIC, COS. ABOUT TO CHANGE SCALE

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Ravi Dharamshi



VALUEQUEST

*Powered by Ideas.  
Driven by Values.*

Dimensions to be considered:

- 1) 21 years of exposure to India equities
- 2) Mentored by Rakesh Jhunjhunwala
- 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

*Portfolio of companies about to change scale*

# THE MOST RATIONALE WAY TO PARTICIPATE IN INDIA CONSUMPTION STORY

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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) Invest only in B2C cos. from a list super 70 based on proprietary research
- 5) The only PMS in India focused solely on B2C consumption businesses

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

A black and white photograph of two men in business suits shaking hands. The man on the left has a beard and glasses, while the man on the right is smiling and wearing glasses. They are standing in front of a large bookshelf filled with books.

# FULL INTERVIEW

ALDER CAPITAL PMS

## INDIA CONSUMPTION STORY AND CONSUMER TECH



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**Equity**   
**Math**





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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.**

**Equity 7  
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# FULL INTERVIEW

ALFACCURATE ADVISORS PMS

## BUILDING WEALTH BY OWNING LEADERS IN OLIGOPOLIES



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**Math**

# WHO IS SPEARHEADING EQUITY MATH.. ?

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- 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 as Sales and CRM lead with a sebi-registered PM (Care PMS)
  - b) c.7 years in stock broking with focus on delivery based investment and trading
  - c) c.4 years in research support to proprietary trading and investment desks
- 3) Current clientele consists primarily of individuals (resident and NRIs) and a few corporates
- 4) Aim for distant gratification -- no upfront fees, no set-up nor consultation fees



**Shshank Mehta, Founder, Equity Math**

# Thank you!

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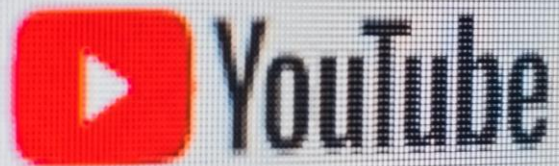
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