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shah investor's home ltd®

SERVICES THAT SECURE SMILES

Investing Values

Creating Prosperity

WEALTH MANAGEMENT

Wealth Management is a continuous investment advisory process combining Financial Planning, Investment Management and Risk Management

Knowing yourself & your goals

- We work with you to analyse your current investments
- Understand your financial goals and timelines

Cut through the noise

- We analyse overwhelming choices of investment vehicles
- We figure out the best investments in various categories that will help you reach your goals

Accountability

- We are accountable to you for the best advise possible in current circumstances
- Routine checkpoints of the portfolio and plan

September - 2018

INDIAN FINANCIAL LANDSCAPE

art of confusion

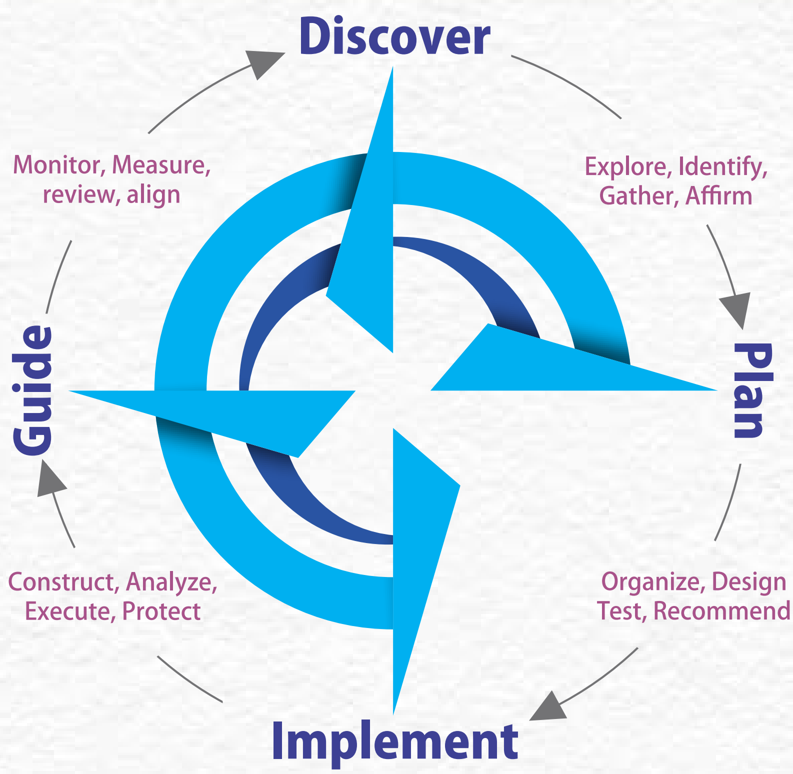
- More than 700 banks offering FD
- More than 2,000 Fixed income schemes
- More than 7,000 listed stocks
- More than 20 TV news channels
- More than 5,000 Mutual Fund schemes
- More than 500 print media outlets
- More than 2,00,00,000 well wishers

WEALTH MANAGEMENT

Financial Planning
Life stage, Retirement, Education
Tax efficient Planning

Equity & Mutual Funds
Devise Long-term Equity Portfolio
Continuous monitoring and rebalancing as required Systematic Investment Strategy

Fixed Income
Devise high quality Fixed Income Portfolio Tax efficient planning with structured returns



FINANCIAL PLANNING PROCESS

INVESTMENT OPTIONS

EQUITY Markets	DEBT Instruments	Gold / Silver (Bullion)
Stocks	Bank FDs	Physical
Mutual Funds	Bonds	Gold ETF
Derivatives	PPF	Gold Bonds
SIP	Liquid Funds	
ETF	Tax Free Bonds	

PORTFOLIO STRATEGY

STYLE & PERFORMANCE

Portfolio Value 4,95,732.15

Performance 31-07-2018

Morningstar Equity Style Box %

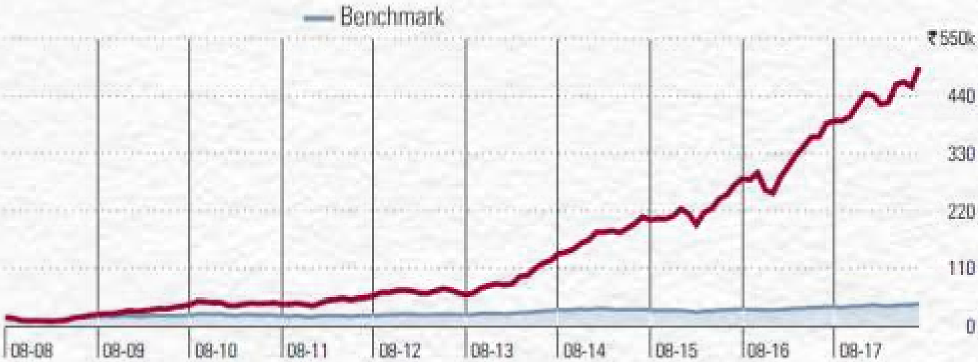
	Value	Blend	Growth
Large	0	0	71
Mid	0	0	10
Small	0	0	19

0-10 10-25 25-50 >50

Total Stock Holdings
10

% Not Classified
0

Investment Activity Graph — Portfolio — Benchmark Initial Mkt Val: ₹16,732 Final Mkt Val: ₹495,732

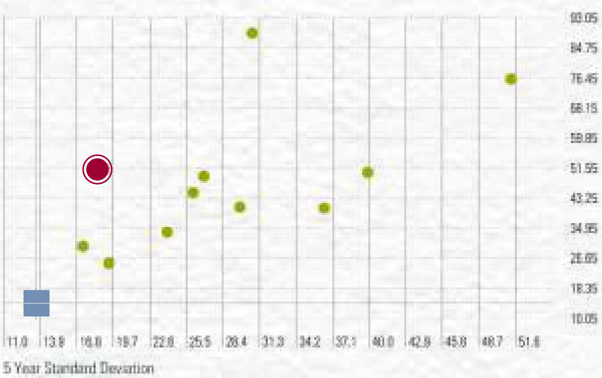


Trailing Returns	3 Mo	1 Yr	3 Yr	5 Yr	10 Yr
Portfolio Return	7.21	27.86	33.54	51.18	41.18
Benchmark Return	6.96	15.66	10.18	14.22	10.11
+/- Benchmark Return	0.25	12.20	23.36	36.96	31.07

Disclaimer: The portfolio level performance is for illustrative purpose only. Returns may vary from illustrative return shown and may also vary from investor to investor and portfolio to portfolio based on entry / exit time, investment goals and risk taking appetite. The performance data reflects monthly portfolio rebalancing.

RISK & RETURN

Risk/Reward Scatterplot Portfolio Holdings Bmark

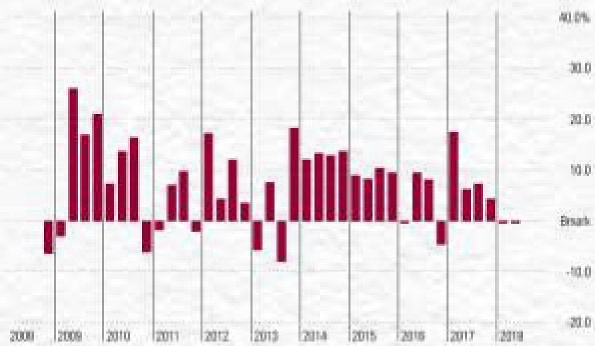


Little increase in Standard Deviation resulted in much better returns compared to the BSE Sensex

Risk and Return Statistics	3 Yr Portfolio	3 Yr Bmark	5 Yr Portfolio	5 Yr Bmark	10 Yr Portfolio	10 Yr Bmark
Standard Deviation	18.12	13.80	18.93	13.58	26.05	20.76
Mean	33.54	10.18	51.18	14.22	41.18	10.11
Sharpe Ratio	1.71	0.53	2.52	0.77	1.53	0.38

PERFORMANCE HISTORY

Performance History Graph Portfolio Quarterly returns +/- Benchmark in %



MPT Statistics	3 Yr Portfolio	5 Yr Portfolio	10 Yr Portfolio
Alpha	20.03	28.59	25.76
Beta	1.03	1.09	1.09
R-Squared	61.15	61.46	76.07

CHARGES

Services	Annual Fixed Charge	Hurdle Rate	% Sharing Above Hurdle Rate
Financial Planning	1%	12%	20%
Equity Advisory	1%	12%	20%
Portfolio Evaluation	1%	Nil	Nil

Portfolio Return	Annual Fixed Charge	SIHL Sharing	Net Return
12%	1%	0	11%
20%	1%	20% of 8% = 1.60%	17.40%
25%	1%	20% of 13% = 2.60%	21.40%

DISCLAIMER

Shah Investor's Home Ltd.'s Research and Advisory teams have, to the best of its ability, taken into account various factors – both quantitative measures and qualitative assessments, in an unbiased manner, while choosing the investments mentioned in the document. However, they carry unknown risks and uncertainties linked to broad markets, as well as analysts' expectations about future events. They should not, therefore, be the sole basis of investment decisions.

The recommendations and reviews do not guarantee portfolio performance, nor should they be viewed as an assessment of portfolio's, or the portfolio's underlying securities' creditworthiness.

Equity and Mutual Fund investments are subject to market risks. Please read the scheme information and other related documents before investing. Past performance is not indicative of future returns. Please consider your specific investment requirements before choosing a fund, or designing a portfolio that suits your needs.

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