



HANDPICKED BUY PMS

Aarth AIF

CAT III - LONG SHORT

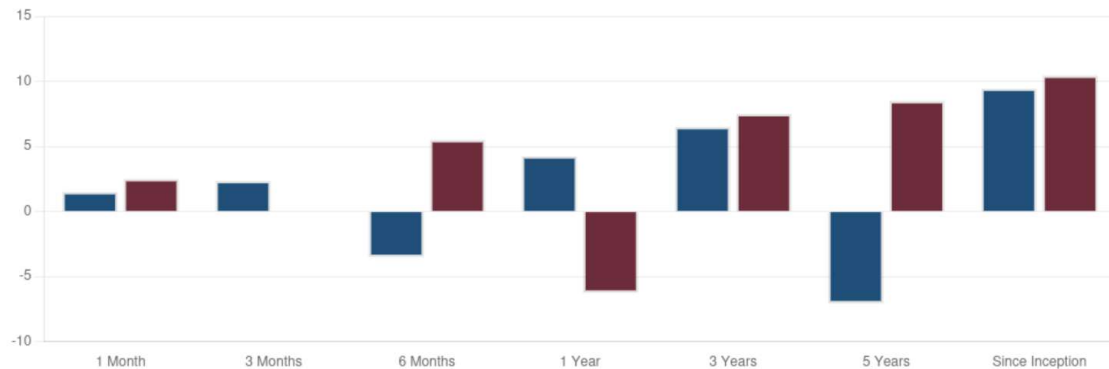
BENCHMARK
NIFTY 500 TRI

INCEPTION
1 February, 2023

MIN. INVESTMENT
1,00,00,000

AUM (₹ CR)
550.25

Investment Approach vs Benchmark

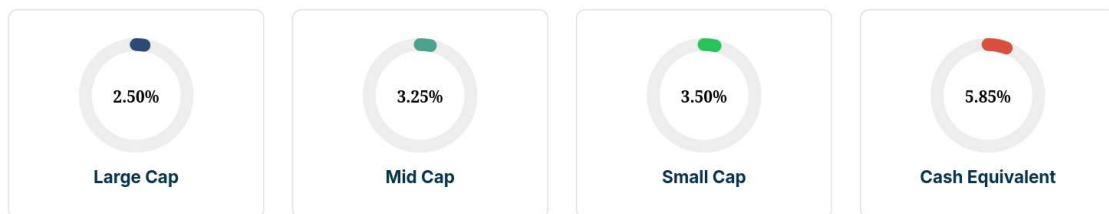


Investment Approach Trailing Returns %

	INVESTMENT APPROACH	BENCHMARK
1st Month	1.50%	2.50%
3rd Month	2.35%	N/A
6th Month	-3.50%	5.50%
1st Year	4.25%	-6.25%
3rd Year	6.50%	7.50%
5th Year	-7.06%	8.50%
Since Inception	9.45%	10.45%

* Returns are as on 31st March 2025 , * Returns over a 1 year period are annualized * Returns are calculated using the Time Weighted Rate of Return (TWRR) method and as provided by the respective AMCs. * ND (No Data) , * NA(Not Applicable) * Returns of the respective Benchmark Indices used are tabulated above. Benchmark(s) given are as per SEBI circular no. SEBI/HO/IMD/IMD-PoD-2/P/CIR/2022/172 dated December 16, 2022 and the APMI circular no. APMI/2022-23/02 dated 23rd March,2023 and Revised Annexure-1

Composition



Fund Manager



Mr Salvin Shah
HEAD - AIF

test data. Has 11+ years in Portfolio Management and Equity Research, Salvin has extensive experience in managing Indian Equities. His

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Mr Radha Raman Agarwal
FUND MANAGER

Mr. Radha Raman Agarwal is a rank-holder Chartered Accountant with more than 20 years of corporate experience in the field of Finance.

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Fee Structure

Exit Load

1st Year 5.5%
2nd Year 6.5
3rd Year 7.5

Fixed Fee

AMC 5.5

Variable Fee

AMC 5.5
Hurdle 6.5
Profit Sharing 10

Start Your Investment

TOP HOLDINGS

TOP SECTORS

HDFC Bank Ltd	10.37%
ICICI Bank Ltd	8.19%
Suven Pharmaceuticals Limited	5.09%
Infosys Ltd	5.00%
Indus Towers Limited	4.38%

Portfolio Characteristics

Total Number of Stocks	NA
Top 5 Stocks %	Undisclosed
Top 5 Sectors %	Undisclosed
Average Market Cap	313078.12
Portfolio Age	2 Years 3 Months
SIP	No Option

Newsletter

January Newsletter

APRIL 2025

-  Top Holdings
-  Top Sectors
-  Capwise Allocation
-  Performance v/s Banchmark

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