Why Investment Advisory Portfolio - Equity?

Designed to retain the flexibility of direct ownership for. Wealth Creation

Provides the discipline, professional competency, & long term approach similar to that of a Mutual Fund/PMS

Empowers the individual investor with the power of Award-Winning, Multi-Asset, Multi-Strategy Research

RW Industry Leaders Theme

Objective - Long term capital appreciation by investing in companies that are the top-3 players of their respective industries.

Strategy - 'RW Industry Leaders Theme' identifies companies that are the leaders of their respective industries & are also showing 'growth in value' characteristics with expected higher return ratio.

Portfolio Snapshot - Min. Inv. Amt.: ₹3,00,000 | Top Up Amt.: ₹50,000 | Time Horizon: 3 yrs | Exp. CAGR: 14% | No. of Stocks: 12-18

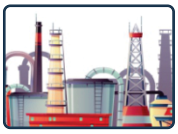
RW Unnati Theme

Objective - Long-term capital growth by investing in smaller but growing companies of India

Strategy - Identifying & actively investing in companies with improving fundamentals in the RW Unnati Theme Investment Universe. Tactical weight allocation under the sub-classes to get positive returns while managing the risk.

Portfolio Snapshot- Min. Inv. Amt.: ₹3,00,000 | Top Up Amt.: ₹50,000 | Time Horizon: 7 yrs. | Expected CAGR: 18% | No. of Stocks: 20-30

RW Shreyas Mini Theme



Objective - To participate in the India growth story through investing in the Indian equity markets by building a diversified portfolio across various sectors & caps.

Strategy - Portfolio prefers stocks which fall under the 'Growth in Value' theme & passes through the '360-degree Deductive Reasoning Framework.

Portfolio Snapshot- Min. Inv. Amt.: ₹5,00,000 | Top Up Amt.: ₹1,00,000 | Time Horizon: 5 yrs. | Expected CAGR: 15% | No. of Stocks: 20-30

RW 5Tx5T Thematic Advisory Portfolio

Objective - This portfolio provides a unique theme-based investing opportunity in the Indian market & focuses on themes that should form part of India's next growth engine

Strategy - This Portfolio invests in sub-sets of 4-6 Themes out of multiple themes underlying the economic buoyancy. Stocks would be from all the three namely- large, mid & small cap segments of the market.

Portfolio Snapshot- Min. Inv. Amt.: ₹5,00,000 | Top Up Amt.: ₹100,000 | Time Horizon: 3 yrs. | Expected CAGR: 18% | No. of Stocks: 15-20

Investment Advisory Portfolio Performance

	1 Year	3 Years	5 Years	Since Inception
RW Industry Leaders (ID: 1st oct.2009)	0.9	16.7	9.4	18.3
RW Unnati (ID: 2nd April 2013)	-0.1	18.9	6.9	22.9
RW Shreyas Mini (ID: 1st oct. 2009)	0.7	20.5	13.7	17.5
RW 5TX5T (ID: 1st April 2013)	-0.6	16.6	14.0	20.5
Vs Benchmark				
Nifty 100	0.4	14.7	9.5	9.7
Nifty Mid & Small 400	5.2	22.2	9.1	16.3
Nifty 500	1.5	16.3	9.4	9.9/ 12.6

Please Note: Data is as on February 2023, 1yr is ABSOLUTE returns. 3yr/5yr/SI figures are CAGR Returns. ID - Inception Date

Value of INR 1CR as on February 2023

Invested in October 2009

NS Multi-Cap	INR **8.7Cr**	VS	Nifty 500	INR **3.5Cr**
NS Industry Leaders	INR **9.5Cr**		Nifty 100	INR **3.5Cr**

Invested in April 2013

NS Mid & Small Cap	INR **7.7Cr**	VS	Nifty Mid & Small 400	INR **4.5Cr**
NS 5Tx5T	INR **6.4Cr**		Nifty 500	INR **3.3Cr**