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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 - 'NS 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. Investment Amount - 3,00,000 | Top Up Amt.: Rs 50,000 | Time Horizon: 3 yrs | Expected 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 NS Mid & Small Cap Investment Universe. Tactical weight allocation under the sub-classes to get positive returns while managing the risk.

Portfolio Snapshot - Min. Investment Amount - 3,00,000 | Top Up Amt.: Rs 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. Investment Amount - 5,00,000 | Top Up Amt.: Rs 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. Investment Amount - 5,00,000 | Top Up Amt.: Rs 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)	0.4	17.7	11.7	19.1
RW Unnati (ID: 2nd April 2013)	-2.8	24.2	8.6	24.7
RW Shreyas Mini (ID: 1st oct. 2009)	1.3	22.0	15.2	18.4
RW 5TX5T (ID: 1st April 2013)	-1.4	19.0	15.5	21.9
Vs Benchmark				
Nifty 100	2.0	14.9	11.2	10.5
Nifty Mid & Small 400	2.9	24.4	10.4	17.5
Nifty 500	2.2	16.7	11.0	10.6/13.8

Please Note: Data is as on October 2022, 1yr is ABSOLUTE returns. 3yr/5yr/SI figures are CAGR Returns. ID - Inception Date

Value of INR 1Cr as on October 2022

Invested in October 2009

NS Multi-Cap INR 9.1Cr | VS | Nifty 500 INR 3.7Cr
NS Industry Leaders INR 9.9Cr | VS | Nifty 100 INR 3.7Cr

Invested in April 2013

NS Mid & Small Cap INR 8.3Cr | VS | Nifty Mid & Small 400 INR 4.7Cr
NS 5Tx5T INR 6.7Cr | VS | Nifty 500 INR 3.5Cr