



AIF

Product

Factsheet

Manufacturer

Ticket Size

Close Date

Suitability

IIFL
Turnaround
Strategy

PPT

IIFL AMC

Rs. 1 Cr

Ongoing

Investors intending to create a portfolio of such businesses with an established track record which have the potential to see a sharp improvement in fundamentals in the future.

Renaissance
Next India
Fund II

PPT

Renaissance

Rs. 1 Cr

Ongoing

Suitable for Investors who intend to invest in portfolio while focuses on recovery on Indian economy which slowed down sharply during 2016-18 due to disruptive reforms like demonitisation, RERA, IBC and GST.

ICICI Pru
Corporate
Credit Fund

PPT

ICICI
Prudential

Rs. 1 Cr

Ongoing

A dislocation exists in the credit markets as existing lenders have become risk averse and are focused on lending to higher rated corporates and expanding retail lending business. Investors must look forward to investing in structured credit asset class which is expected to grow to \$100 bn in next 5 years.

Sundaram
ATLAS

White
Oak

Rs. 1 Cr

Ongoing

An open-ended multi-cap fund with investments in large, mid and small-cap stocks with the objective of seeking long term capital appreciation. Atlas offers an opportunity to participate in opportunities in multiple sectors and across cap curve.

Motilal Oswal
Hedge Equity
Multifactor
Strategy

Motilal
Oswal

Rs. 1 Cr

Ongoing

Motilal Oswal Hedged Equity Multifactor Strategy AIF combines a multifactor, model-driven investing approach along with tail-hedging. This scheme has low overlap with Nifty50 companies and a correlation of 65-70% leading differentiated portfolio exposure.

SageOne
Flagship
Growth2

SageOne

Rs. 1 Cr

Ongoing

SageOne believes in investing in high-growth businesses. They trace and track companies that gain and hold market share, contributing significantly to their earnings growth. The criteria they apply while selecting these businesses is they should have long-term growth potential of more than 20% per annum and 25% at the portfolio level.

IIFL Multi
strategy Fund
Series 2

PPT

IIFL AMC

Rs. 1 Cr

Ongoing

Investors intending to invest in a portfolio which invests in two funds targeting to benefit from the opportunities available in the late-stage tech space in the Indian internet economy.

Alchemy
Leaders of
Tomorrow
Series 2

PPT

Alchemy
Capital

Rs 1 Cr

Ongoing

Portfolio invests in leaders of tomorrow companies that understand the role of technology, adapt to their advantage, shape consumer behaviour and service them better, build a leaner business model and creat MOAT and manage their risks better.

<p><u>IIFL SOF Series 10</u></p>	<p><u>PPT</u></p>	<p>IIFL AMC</p>	<p>Rs. 1 Cr</p>	<p>Ongoing</p>	<p>Investors looking to invest in portfolio consisting of investing in Mid-to-late-stage deals, Segment leaders, profitable companies and companies with prior institutional backing. Investment will be preferably in the sectors of finance, consumption and healthcare.</p>
<p><u>IIFL Dynamic Fund</u></p>	<p><u>Latest Factsheet</u></p>	<p>IIFL Securities</p>	<p>Rs 1 Cr</p>	<p>Ongoing</p>	<p>Investors intending to grab opportunities due to change in the management of the companies, private equity acquiring majority stake in listed entity, Fundamentally sound IPO's having modest debut, inorganic acquisition by listed companies and so on.</p>
<p><u>Motilal-Oswal-India-Excellence-Series-II(Mid-to-Mega-2)</u></p>		<p>Motilal Oswal</p>	<p>Rs 1 Cr</p>	<p>Ongoing</p>	<p>Investors intending to invest in portfolio that harnesses Mid-sized, quality ,growing, long term relevant and reasonable valued businesses.</p>
<p><u>White Oak IEF V</u></p>	<p><u>PPT</u></p>	<p>White Oak</p>	<p>Rs 1 Cr</p>	<p>Ongoing</p>	<p>Investment Objective is that outsized returns should be earned over time by investing in great businesses. And, a great business is one that is well managed, growing, scalable, and generates superior returns on incremental capital. A bottom-up stock selection based Philosophy is followed which intends to buy great businesses at attractive values. The motto is to invest in businesses, not to bet on macros as the firm believes that macros are for entertainment, so, watch them, but focus on Micros i.e. the underlying portfolio companies in terms of business earnings, and valuations- this is where White Oak's Team keeps its focus.</p>

[ICICI Prudential Long Short Fund](#)

[PPT](#)

ICICI Prudential

Rs 1 Cr

Ongoing

Investors looking to diversify a portfolio of pure long-only equity investments, spread risk, and generate potential returns irrespective of market movements. Portfolio has the potential to deliver positive returns over time.

[Motilal Oswal NTDOP AIF](#)

[PPT](#)

Motilal Oswal

Rs 1 Cr

Ongoing

The portfolio currently have investment across market capitalization. It is a Multicap Strategy that aims to predominantly invest in Large and Mid Cap Stocks at the time of initial ideation and investment made as per the model portfolio of the strategy.

[Nippon India Opportunities Fund - 7](#)

[PPT](#)

Nippon

Rs 1 Cr

Ongoing

Aims to deliver superior returns by investing in India growth story through a focussed portfolio of high growth businesses that stand to benefit over next 5-7 years. Investors seeking long term wealth creation through investment in high growth companies

PMS

Product

Factsheet

Manufactur

Ticket Size

Close

Suitability

[IIFL Phoenix](#)

[Latest Factsheet](#)

IIFL Phoenix

Rs. 50 lac

Ongoing

IIFL Phoenix Portfolio intends to create a portfolio of such businesses with an established track record, which have the potential to see a sharp improvement in the fundamentals in the future. Investors can take advantage of such a portfolio.

<u>IIFL Multicap PMS</u>	<u>Latest Factsheet</u>	IIFL AMC	Rs. 50 lac	Ongoing	<p>Investors looking for generating long term capital appreciation for investors from a portfolio of equity and equity related securities can opt for this PMS. The investment strategy is to invest in companies and in sectors that are available at significant discount to their intrinsic value and provide earnings visibility.</p>
<u>Abakkus All Cap Approach</u>	<u>Latest Factsheet</u>	Abakkus	Rs. 50 lac	Ongoing	<p>The investment objective of the Abakkus All Cap Approach would be to generate alpha and risk adjusted returns for client by investing in benchmark agnostic multicap portfolio. Investors can take advantage of such portfolios.</p>
<u>White Oak India Pioneers Equity Portfolio PMS</u>	<u>Latest Factsheet</u>	White Oak India Pioneers	Rs. 50 lac	Ongoing	<p>The portfolio aims to ensure balanced portfolio of selected companies agnostic to benchmark, focus on ensuring alpha generation is a function of stock selection, consciously avoid market timing or sector rotation or other such top-down bets. Investor looking for a disciplined portfolio can go for it.</p>
<u>Renaissance Alpha Portfolio</u>	<u>Latest Factsheet</u>	IIFL AMC	Rs. 50 lac	Ongoing	<p>Investors intending to invest in quality businesses that can deliver sustainable high growth over medium term to long term. Superior quality businesses as demonstrated by Competitive edge, Pricing power, ROE, FCF. Good quality and competent management teams</p>

[Sundaram
Emerging
Leadership
Fund \(SELF\)
Portfolio](#)

[Latest
Factsheet](#)

Sundaram

Rs. 50 lac

Ongoing

Investors willing to invest in “Scalable” Companies with potential to transition from Midcap to Large cap & Small-cap to Mid-cap.

[Sundaram
India Secular
Opportunities
Portfolio
\(SISOP\)](#)

[Latest
Factsheet](#)

Sundaram

Rs. 50 lac

Ongoing

Investors looking for portfolio with superior returns by investing in stocks from sectors that can benefit from India's emerging businesses. It aims to predominantly invest in Small and Midcap stocks with a focus on identifying potential winners. Focus on Sectors and Companies which promise a higher than average growth.

[India
Opportunity
Portfolio
Strategy
\(IOP\)](#)

[Latest
Factsheet](#)

Motilal
AMC

Rs. 50 lac

Ongoing

Investors aiming to generate long term capital appreciation by investing in a focused portfolio of high growth stocks having the potential to grow more than the nominal GDP for next 5-7 years across market capitalization and which are available at reasonable market prices.

[Next Trillion
Dollar
Opportunity
\(NTDOP\)](#)

[Latest
Factsheet](#)

Motilal
AMC

Rs. 50 lac

Ongoing

"Investors intending to invest in portfolio that delivers superior returns by investing in stocks from sectors that can benefit from the Next Trillion Dollar GDP growth. It aims to invest in stocks across market capitalisation with a focus on identifying potential winners that would participate in successive phases of GDP growth."

Value Strategy PMS	Latest Factsheet	Motilal AMC	Rs. 50 lac	Ongoing	Investors aiming to benefit from the long term compounding effect on investments done in good businesses, run by great business managers for superior wealth creation.
Alchemy PMS High Growth (Select Stock)	Latest Factsheet	Alchemy	Rs. 3 cr	Ongoing	Investors looking to invest in companies across the market capitalization range, which have high growth potential and potential to deliver long-term capital appreciation. Since portfolio is concentrated, focus is more on stock selection than on market cap allocation
Alchemy PMS High Growth	Latest Factsheet	Alchemy	Rs. 50 lac	Ongoing	Investors aiming to generate long-term returns by investing in equities and equity related instruments, across all market capitalizations with a mid cap bias. Portfolio believes that consistent and superior long-term absolute returns can be made across market cycles by investing in growth companies with good management teams.
Alchemy PMS Leaders	Latest Factsheet	Alchemy	Rs. 50 lac	Ongoing	"Investors wanting to generate long-term returns by investing in Large-Cap equities. The philosophy behind this portfolio is to invest in growth companies, which have achieved scale and have reached or have potential to be amongst the leaders in their field/industry segments. Typically, these companies would have experience of operating through good-bad business cycles."
Marcellus Consistent Compunders	Latest Factsheet	Marcellus	Rs. 50 lac	Ongoing	Portfolio invests in businesses with clean financial accounts, companies with track record of superior capital allocation, Amongst companies which pass steps 1 & 2, identify those with high barriers to entry.

Marcellus Kings of Capital Portfolio (KCP)	Latest Factsheet	Marcellus	Rs. 50 lac	Ongoing	<p>The key objective of the portfolio is to own 10 to 14 high quality financial companies (banks, NBFCs, life insurers, general insurers, asset managers, brokers) that have good corporate governance, prudent capital allocation skills and high barriers to entry. By owning these high quality financial companies, investors can benefit from the consolidation in the lending sector and the financialization of household savings over the next decade.</p>
ASK India Select Portfolio (ISP)	Latest Factsheet	ASK Investment Managers Ltd	Rs. 50 lac	Ongoing	<p>Investors aiming to invest portfolio with best ideas from business attributes like size of opportunity, size of pond vs. size of fish, quality of business, superior ROCE, key pivot of strong wealth creation, earnings growth, quantum, consistency and durability of earnings, price-value gap or margin of safety.</p>
ASK Indian Entrepreneur Portfolio (IEP)	Latest Factsheet	ASK Investment Managers Ltd	Rs. 50 lac	Ongoing	<p>Investors intending to invest in entrepreneurially driven and/or family-owned businesses listed on the Indian stock markets, for compounding gains over the medium to long term.</p>
Quest Multi PMS	Latest Factsheet	Quest Investment Advisors	Rs. 50 lac	Ongoing	<p>Investors looking for portfolio that invests in sector and market-cap agnostic looking for outsized upside potential, strong leadership position in its domain and within the industry, with strong pricing power and not a 'me too' player in the industry and companies with strong ROE which are upward trending and steady or growing margins</p>

[ICICI Pru
Contra
Strategy](#)

[Latest
Factsheet](#)

ICICI
Prudential
AMC

Rs. 50 lac

Ongoing

Investors seeking to generate capital appreciation by investing predominantly in equity and equity related instruments through contrarian investing.

[ICICI Pru
Flexicap
Strategy](#)

[Latest
Factsheet](#)

ICICI
Prudential
AMC

Rs. 50 lac

Ongoing

Investors looking to diversify their investments by selecting a portfolio with a diversified equity strategy that endeavours to achieve long term capital appreciation and generate returns by investing across market capitalisations.

Insurance

Product

Manufacturer

Suitability

[Life
Insurance](#)

Future Generali, Max Life, Bajaj Life, HDFC Life, ICICI Pru Life, TATA AIA

Life insurance is a contract between you and an insurance company. Essentially, in exchange for your premium payments, the insurance company will pay a lump sum known as a death benefit to your beneficiaries after your death.

[Health
Insurance](#)

Max Bupa, Star Health, Religare, ICICI Lombard, HDFC Ergo, Cigna, Apollo

Suitable for health and wellness of the customers. It covers health, critical illness, accident policy (group and personal) etc.

Mutual Fund

Product

Manufacturer

Suitability

Equity Mutual Fund

[Invest Now](#)

Investors who are looking to invest money for at least 3-4 years and looking for high returns. At the same time, these investors should also be ready for possibility of moderate losses in their investments.

Hybird Mutual Fund

[Invest Now](#)

Investors who have advanced knowledge of macro trends and prefer to take selective bets for higher returns compared to other Equity funds. At the same time, these investors should also be ready for possibility of moderate to high losses in their investments even though overall market is performing better.

Debt Mutual Funds

[Invest Now](#)

Investors who have advanced knowledge of macro trends and prefer to take selective bets for higher returns compared to other Equity funds. At the same time, these investors should also be ready for possibility of moderate to high losses in their investments even though overall market is performing better.

NFO

[Invest Now](#)

An NFO is offered at absolute price in which an investor can invest for the given time which is suitable for sector specific fund on the basis of high, mid and low risk taking category. However one should not just consider the absolute price while taking the decision of investing in the NFO which has a designated lock-in period.

Category

Product

Suitability

Bonds

[Bonds](#)

Bonds are an excellent choice for investors looking for a fixed but higher income from a safe option. Bonds are a low-risk investment vehicle when compared to debt funds as it ensures Capital Protection

Stocks

[IIFL Securities](#)

Stocks are ideal for long-term investments. Also, you need to understand that the returns are not guaranteed and be willing to assume the associated risks

US Stocks

[Stockal](#)

"One big advantage of putting money into US markets is that it gives access to investors to deploy money in companies that have a global presence. At the same time, these investors should also be ready for possibility of moderate losses in their investments.

Loan

[Home Loan](#)

Loans are advanced for a number of reasons including major purchases, investing, renovations, debt consolidation, and business ventures. With compounding, the interest owed is higher than that of the simple interest method because interest is charged monthly on the principal loan amount.



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