



More transparent than mutual funds

Stocks reflect in your demat account, no inter scheme holding manipulation



Invest at prevailing market price

In mutual funds the investor get day-end or next day NAV



Other Benefits

Wider choice of investment, loan against shares, no exit load etc.

NS 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 | Possible Drawdown: 15(M)



NS Mid & Small Cap 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 | Possible Drawdown: 15(M)



NS Multi Cap 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 - 5,00,00 | Top Up Amt.: Rs 1,00,000 | Time Horizon: 5 yrs. | Expected CAGR: 15% | No. of Stocks: 20-30 | Possible Drawdown: 15(M)



NS 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	2 years	3 years	4 years	5 years	Since Inception
NS Industry Leaders (ID: 1st oct.2009)	59.4	28.1	19.0	15.3	16.8	20.8
NS Mid & Small Cap (ID: 1st April 2013)	67.5	41.9	25.3	14.7	18.5	28.7
NS Multi Cap (ID: 1st oct. 2009)	65.0	35.0	24.9	19.9	18.7	19.8
Vs Benchmark						
Nifty 100	56.7	24.0	17.1	15.2	15.1	11.3
Nifty Mid & Small 400	78.8	39.5	22.6	14.6	16.1	19.5
Nifty 500	61.1	26.9	18.2	15.0	15.3	11.4

Please Note: Data is as on Sept 2021, 1yr is ABSOLUTE returns. 2yr/3yr/4 yr/5yr/5I figures are CAGR Returns. ID - Inception Date

FIRST INVESTMENT ADVISORY PORTFOLIO LAUNCHED IN 2009

NS MID & SMALL CAP **28.7%** CAGR Since 2013 As on Sept 2021 | **19.5%** Nifty MID & SMALL 400 | NS INDUSTRY LEADERS **20.8%** CAGR Since 2013 As on Sept 2021 | **11.3%** NIFTY 100
NS MULTI CAP **19.8%** CAGR Since 2013 As on Sept 2021 | **11.4%** NIFTY 500