



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



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



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



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)	35.2	28.8	21.5	13.3	17.6	20.6
NS Mid & Small Cap (ID: 1st April 2013)	43.6	40.3	25.5	10.3	19.9	28.2
NS Multi Cap (ID: 1st oct. 2009)	40.6	32.2	27.3	18.4	21.5	19.8
Vs Benchmark						
Nifty 100	25.0	19.8	16.6	12.5	16.0	10.9
Nifty Mid & Small 400	51.3	37.3	22.3	10.7	18.4	19.2
Nifty 500	30.2	23.2	17.8	12.1	16.5	11.1

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

FIRST INVESTMENT ADVISORY PORTFOLIO LAUNCHED IN 2009

NS MID & SMALL CAP **28.2%** CAGR Since 2013 As on December 2021 | **19.2%** Nifty MID & SMALL 400 | NS INDUSTRY LEADERS **20.6%** CAGR Since 2009 As on December 2021 | **10.9%** NIFTY 100
 NS MULTI CAP **19.8%** CAGR Since 2009 As on December 2021 | **11.1%** NIFTY 500