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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

## 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 - 5,00,00 | 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	3 Years	5 Years	Since Inception
NS Industry Leaders (ID: 1st oct.2009)	7.9	15.2	11.6	18.9
NS Mid & Small Cap (ID: 1st April 2013)	6.0	18.2	11.5	24.8
NS Multi Cap (ID: 1st oct. 2009)	16.2	21.5	16.2	18.6
NS 5TX5T (ID: (1st April 2013)	6.1	18.7	15.9	21.6
Vs Benchmark				
Nifty 100	6.1	11.7	11.1	10.1
Nifty Mid & Small 400	9.0	17.7	11.1	17.0
Nifty 500	6.8	12.9	11.1	10.2/ 13.4

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

### Value of INR 1CR as on May 2022

#### Invested in October 2009

NS Multi-Cap INR **8.6Cr** | VS | Nifty 500 INR **3.4Cr**  
NS Industry Leaders INR **8.9Cr** | VS | Nifty 100 INR **3.4Cr**

#### Invested in April 2013

NS Mid & Small Cap INR **7.6Cr** | VS | Nifty Mid & Small 400 INR **4.2Cr**  
NS 5TX5T INR **5.9Cr** | VS | Nifty 500 INR **3.1Cr**