

Power Model Portfolio

What is Power Model Portfolio ?

An all season investment Portfolio


- Power Model Portfolio, an product aims to guide investors build a quality Large-cap portfolio -- it invest in companies with market capitalization of over Rs10,000 crore.
- Use disciplined investment approach and actively track individual portfolios.
- Combine the advantage of technology and in-house research capabilities to generate benchmark beating returns and superior investing experience.

Why invest in Power Model Portfolio ?

Proven Track Record

- Post restructuring, Power Model Portfolio performance has improved significantly and is beating benchmark indices of Nifty for the last one year.
- Monthly Performance Report includes benchmarking performance with Nifty helps investors keep track of their investment portfolio.
- Minimum ticket size is only Rs.5,00,000 unlike portfolio management scheme (PMS) which requires minimum ticket size of Rs50 lakh.

Key Features (Support/Services)


- Centralised execution and customer support teams
 - Sharing of rationale for each recommendation/switch in portfolios
 - No lock-in for investments
 - No profit sharing
 - No Leverage or Margin.
 - No annual maintenance charge
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Investment Objective

Product : Large-cap investment portfolio built using a quantitative model and managed by an experienced team

Investment Objective: Wealth creation through disciplined investing, based on a pre-defined rules and outperform set benchmark indices such as the Nifty, across market cycles.

Product: Risks-Rewards

- For investors seeking long-term wealth creation
 - Product Risk-Reward: This product is suitable for investors having a moderate to medium risk profile and seeking to generate superior risk-adjusted return over 2-5 years with no lock-in obligation.
 - The returns are benchmarked to the Nifty Index
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Salient Features

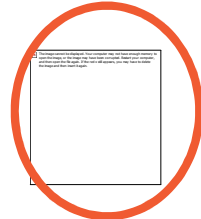
| | |
|---------------------------------|---|
| Launch | May 2015 |
| Ideal Investment Horizon | 3-5 years |
| Investment Universe | Sharekhan Research – Market cap of over Rs. 10,000 crore |
| Number of Stocks | 10 |
| Stocks Weightage | Equally divided into each stock, 10% weightage for each stock |
| Sector Exposure Rule | 30% max exposure/ 3 stocks from preferred sectors |
| Risk Profile | Moderate risks & moderate churns |
| Portfolio Execution | Centralised execution |
| Mode of Communication for Trade | SMS/E-mail/Registered mobile number |
| Stocks / Demat Tracking | Dedicated portal/ E-mail |
| Performance Reporting | As and when required via E-mail |
| Performance Newsletters | Monthly |

Portfolio: Construct Rules and Strategy



Investment Universe

Diversified investment universe with a market-cap of Rs. 10,000 crore and above. Stocks would be picked from the Sharekhan in-house research universe



Sector Exposure

Maximum 30% exposure to one sector at the time of investment initiation. i.e. maximum 3 out of 10 stocks from one sector



Stocks weightage

Portfolio investments will be equally divided among the Top 10 stocks, i.e. 10% weightage for each stock



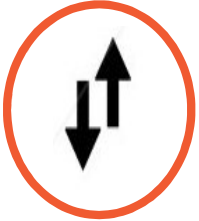
Top 10 Stocks

In-house portfolio model picks the top 10 stocks daily after a rigorous process of screening and portfolio is ready for investment.

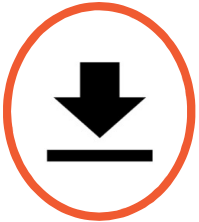
When do we recommend switch from a stock?



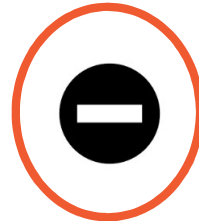
When the target price is achieved



Change in stock stance, from positive to negative



Price corrects more than 20% from the initiation price

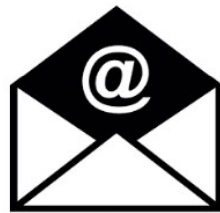


Limited upside potential, relatively to other stocks in universe, switch to stock with higher upside potential

Centralised Execution

For all the recommended trades, both for the New portfolio/ Switch stocks/Top-Up an E-mail and SMS will be sent to the client

Mode of communication



E-mail



SMS

Client can place & execute order just by confirming from his e-mail or replying with code (given in SMS) via registered mobile number to our Number (provided in the SMS).

“The confirmation needs to be given only by the customer.”

Investment size and charges

| | |
|-------------------------|------------------------------------|
| Minimum ticket size | Rs. 500,000 |
| Top-up facility | Rs. 100,000 & in multiples of same |
| Brokerage | Delivery 0.50% + Stat cost |
| Account opening charges | Rs. 499 (Annual) |
| Risk profile | Moderate risks & moderate churns |
| Profit sharing | Nil |

Disclaimer

For more detailed research report, kindly refer our website www.sharekhan.com under Fundamental research section.

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Thank You