

Power Model Portfolio

OVERVIEW

Power Model Portfolio is non-discretionary investment portfolio.

It is a well balanced portfolio which comprises of 10 best large-cap stocks for long-term wealth creation.

Power Model Portfolio aims to outperform the CNXNifty 50, with relatively lower volatility in the portfolio.

INVESTMENT STRATEGY

- The product seeks to outperform through superior selection of well researched, quality companies to build a well-balanced, diversified portfolio.
- It is a moderate-risk, moderate-churn portfolio with a maximum sector exposure of 30% each in a maximum of three stocks
- Investments are equally divided into ten stocks with 10% allocation to each stock

PRICING & PRODUCT FEATURES

- Minimum investment of Rs. 5 lakh
- Charges
 - 0.5% brokerage.
 - No annual maintenance charge
 - No Profit sharing & no Lock-in period for investments.

Power Model Portfolio Performance (as on June 30, 2021)

Duration	Performance Returns	Nifty Returns
1 Month	3.4%	0.9%
3 Month	9.9%	7.0%
6 Month	17.6%	12.4%
1 Year	54.7%	52.6%
2 Year (CAGR)	19.9%	15.5%
3 Year (CAGR)	16.0%	13.6%
5 Year (CAGR)	19.1%	13.7%
Since Inception (17 th July 2015) (CAGR)	15.1%	13.8%

Note: Returns of first client since inception of portfolio on July 17, 2015; returns are CAGR basis for time period over 1 year

TOP Performers

Client	Inception Date	Power Model Portfolio return	Nifty 50 return
Client 1	16-03-2016	191.5%	109.7%
Client 2	11-07-2016	148.7%	85.7%
Client 3	11-03-2016	161.8%	109.3%
Client 4	16-06-2016	137.9%	93.1%
Client 5	22-04-2016	142.7%	99.0%

Note : Top 5 outperformer client Vs benchmark

