

AIF & PMS EXPERTS INDIA

Process-driven returns



Exploring AIF & PMS universe

Preferred investment avenue of wealthy individuals



Alternative Investment Fund

AIFs are pooled investment funds that focus on alternative asset classes beyond traditional stocks and bonds, such as real estate, private equity, hedge funds, startups, and more.



Portfolio Management Service

PMS provides tailored investment portfolios comprising equity, fixed income instruments and individual securities.

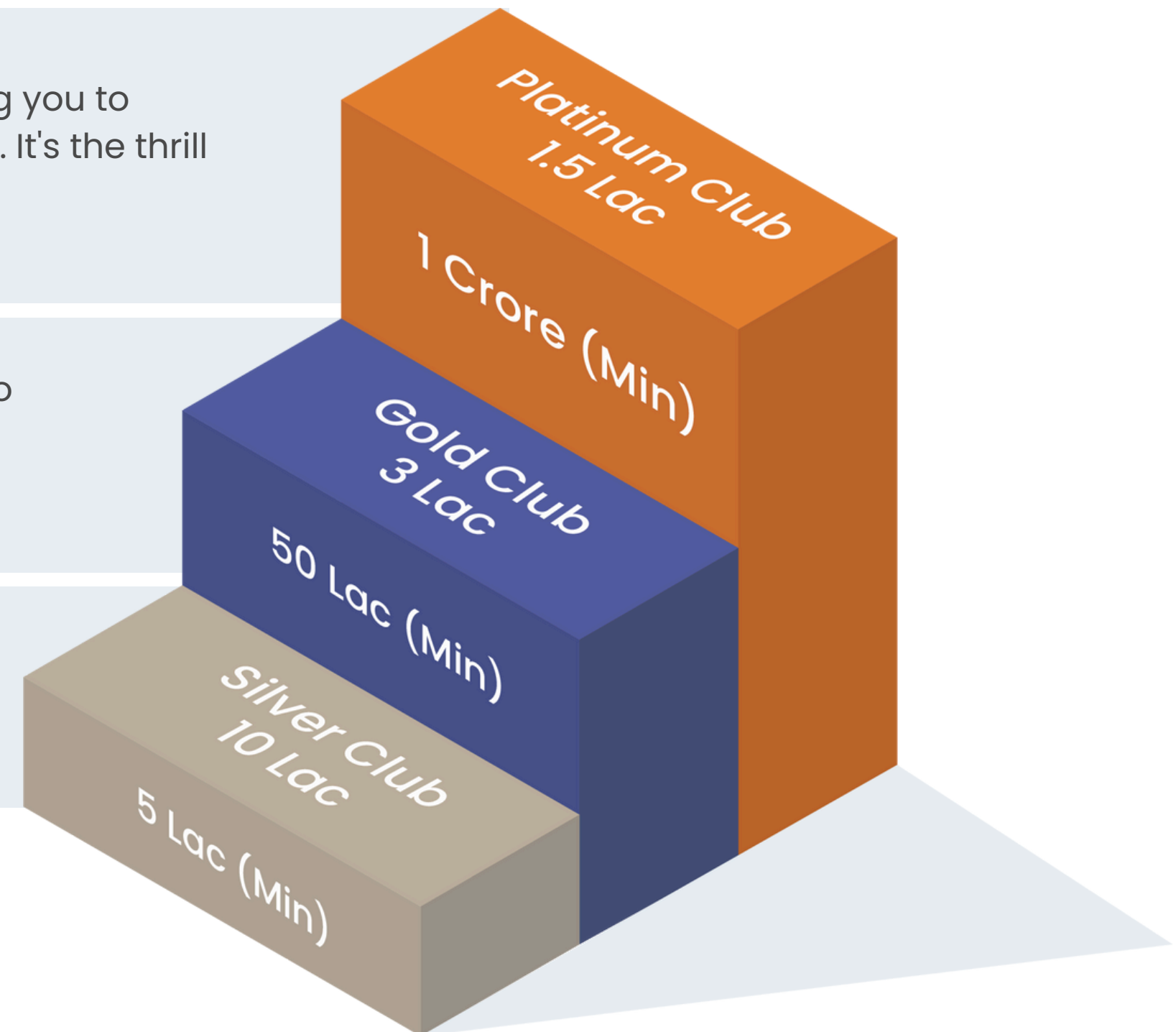
Join the Elite Club of AIFs and PMS

Why settle for the ordinary when you can be extraordinary?

AIFs offer an exhilarating off-road adventure, allowing you to explore uncharted terrain in the world of investments. It's the thrill of navigating beyond the conventional.

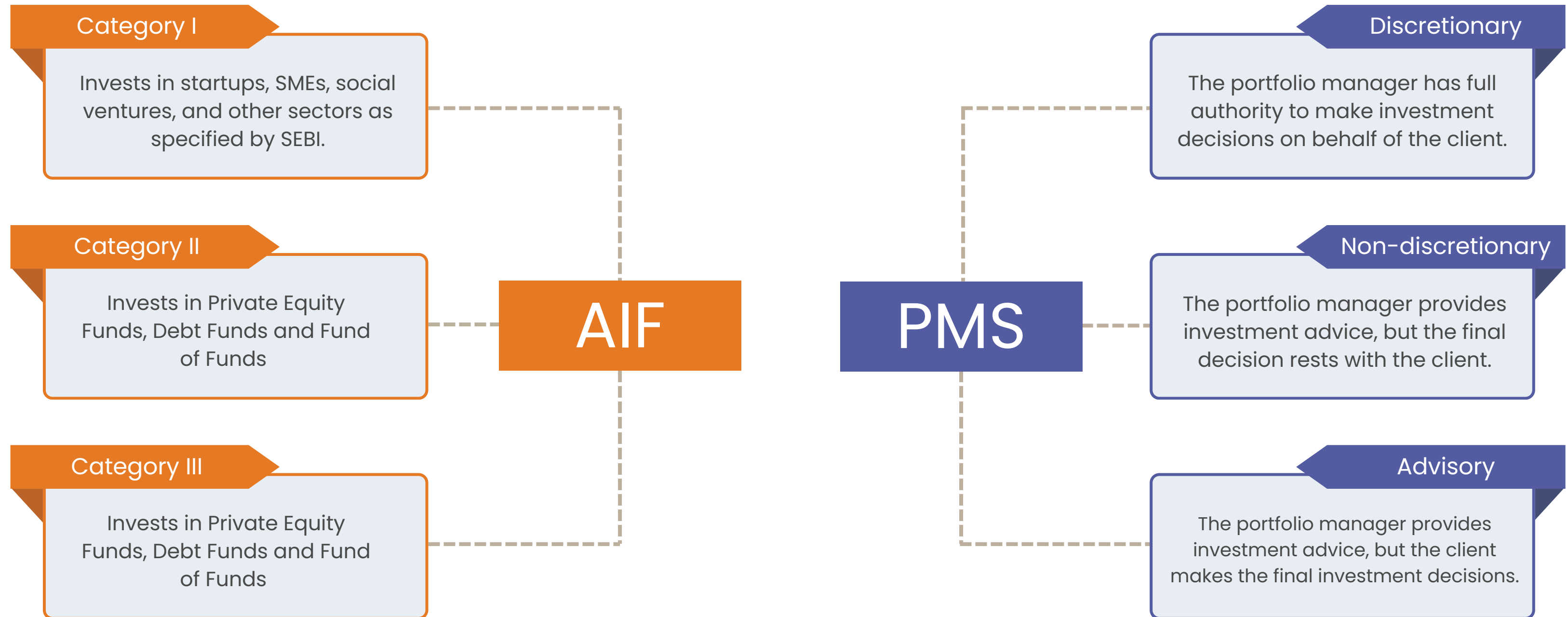
PMS is akin to having a luxury and personal chauffeur who tailors the entire investment journey just for you. It's the bespoke experience in wealth management.

Investing in Mutual Funds is like hopping on a bus. You're one of many passengers on a collective journey.



Types of AIF & PMS

Exclusive investment opportunities tailored for elite investors



History of AIF and PMS

Evolution of AIF & PMS

AIF

PMS



AIF was regulated in 2012 by SEBI



The first AIF was launched in India in 2012-13



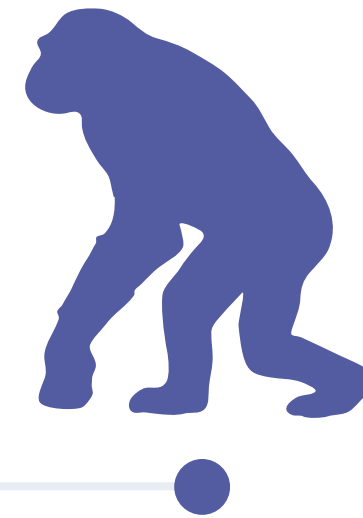
AIF has evolved under SEBI guidelines over 10 years



PMS has evolved under SEBI guidelines over 30 years



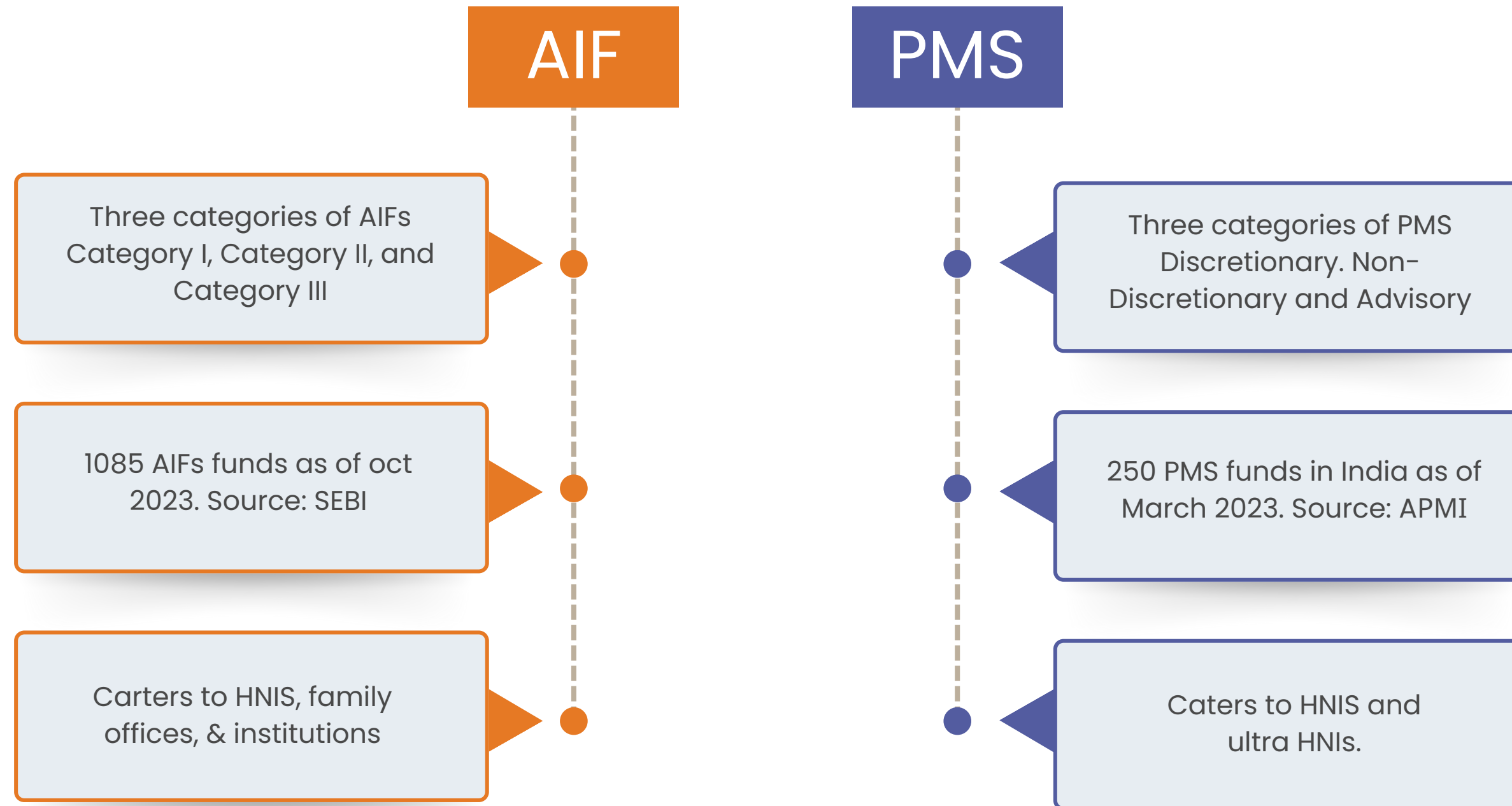
The first PMS was launched in 2000



PMS was regulated in 1993 by SEBI

The Abundance of Funds in AIF and PMS

Shaping the financial journeys of affluent individuals



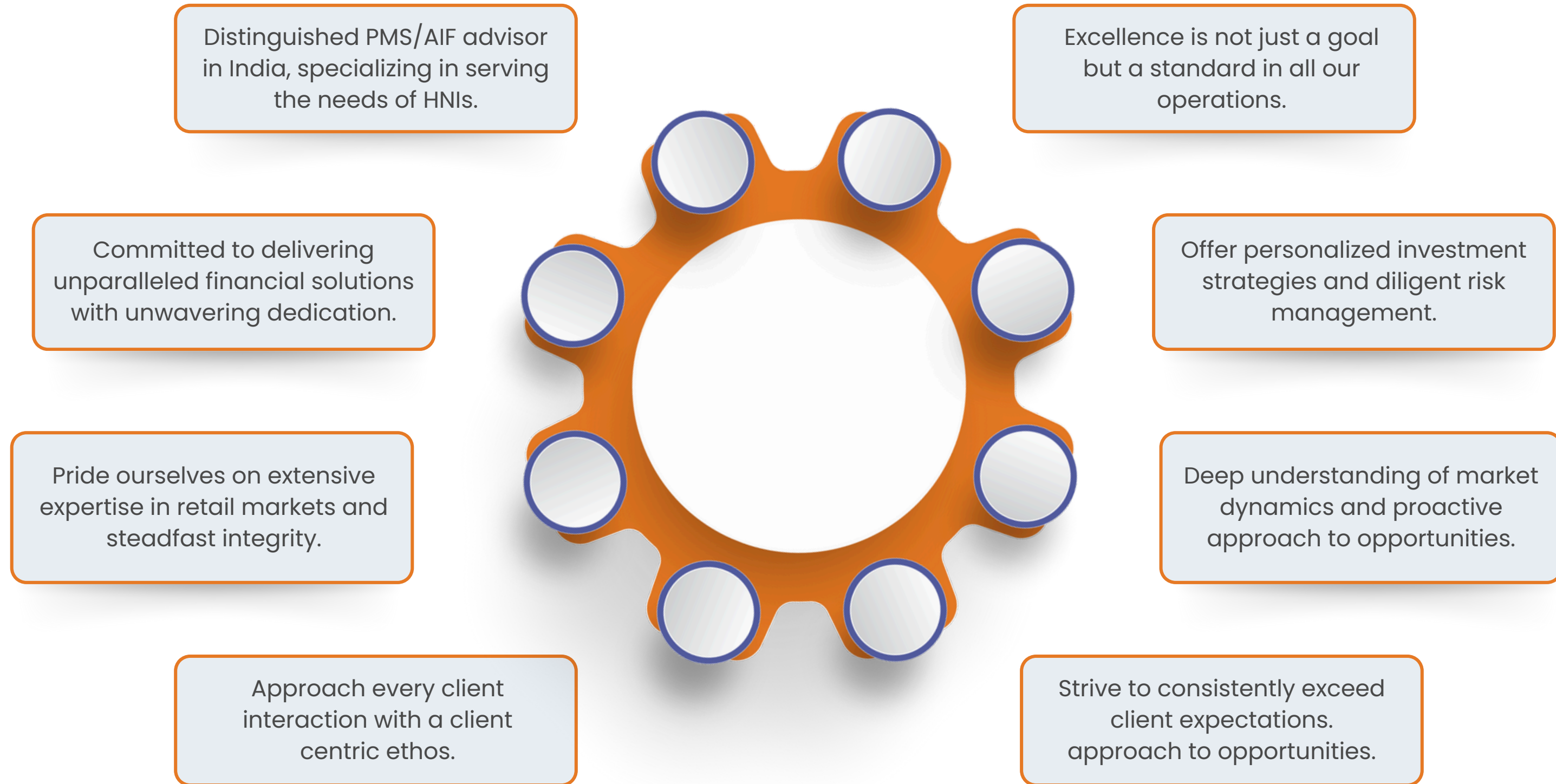
AIF & PMS EXPERTS INDIA

Process-driven wealth creation



We elevate financial horizons for elites

Empowering affluent with tailored solutions



Leverage our unparalleled investment capabilities

You entrust your wealth to seasoned professionals



Our investment prowess sets us apart in investment management, providing a unique advantage to our clients.

We excel in tailoring investment strategies to individual client needs, ensuring optimal alignment with their financial objectives.

With a comprehensive understanding of asset classes and market dynamics, we empower clients to make informed investment decisions.

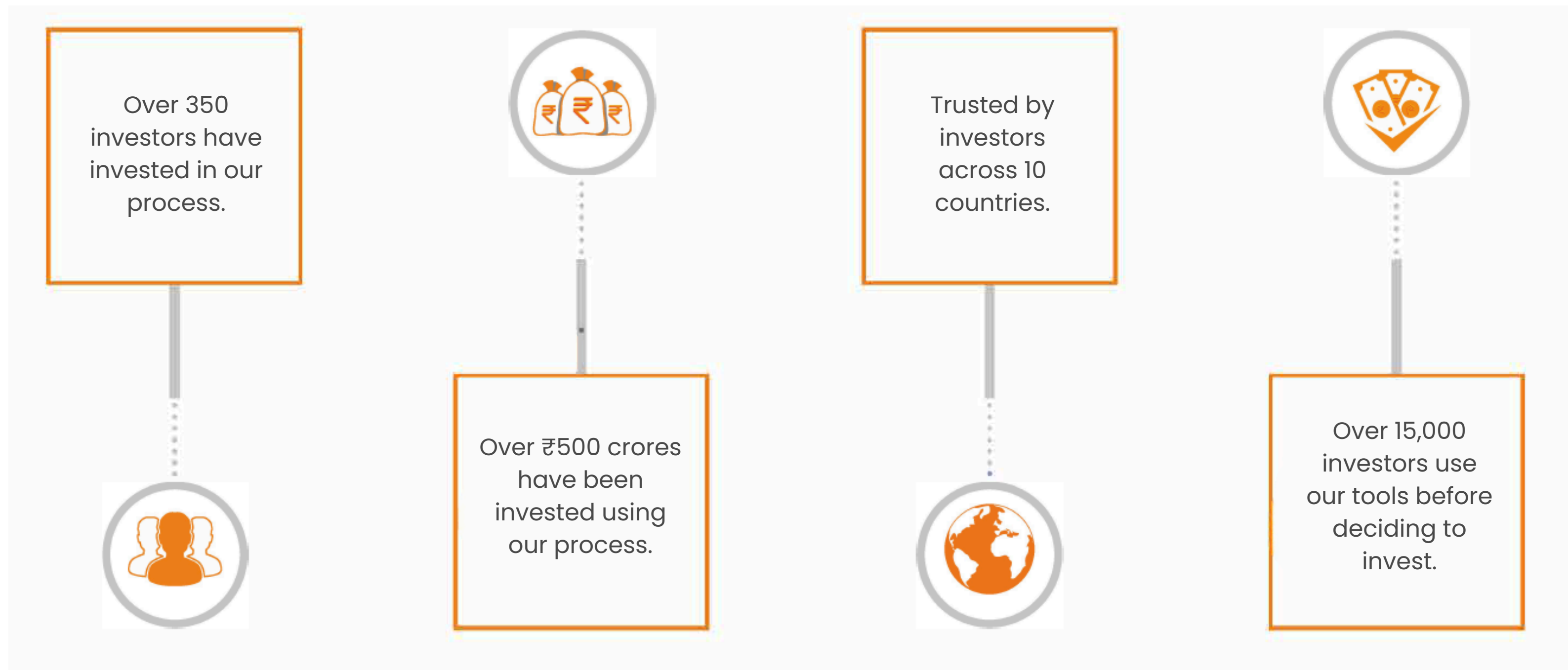
Access to diverse asset classes—equities, fixed income, and alternatives—offers our ultra HNI clients unparalleled opportunities for portfolio diversification and wealth preservation.

Our seasoned team adeptly navigates dynamic market conditions, discerns emerging trends, and capitalizes on lucrative investment opportunities domestically.

Our commitment to excellence in investment management is evident in our pursuit of innovative strategies and rigorous risk management practices.

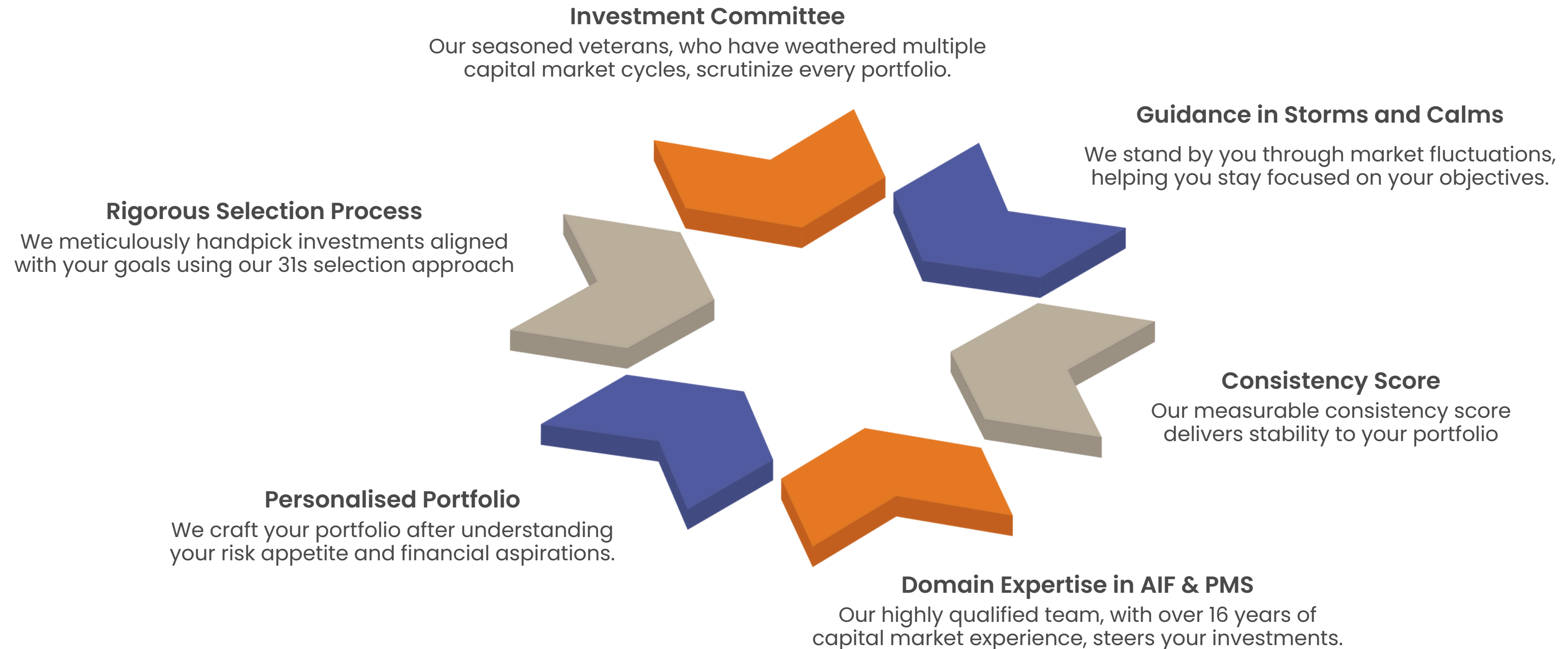
Why Choose AIF & PMS Experts?

A process-driven investment approach



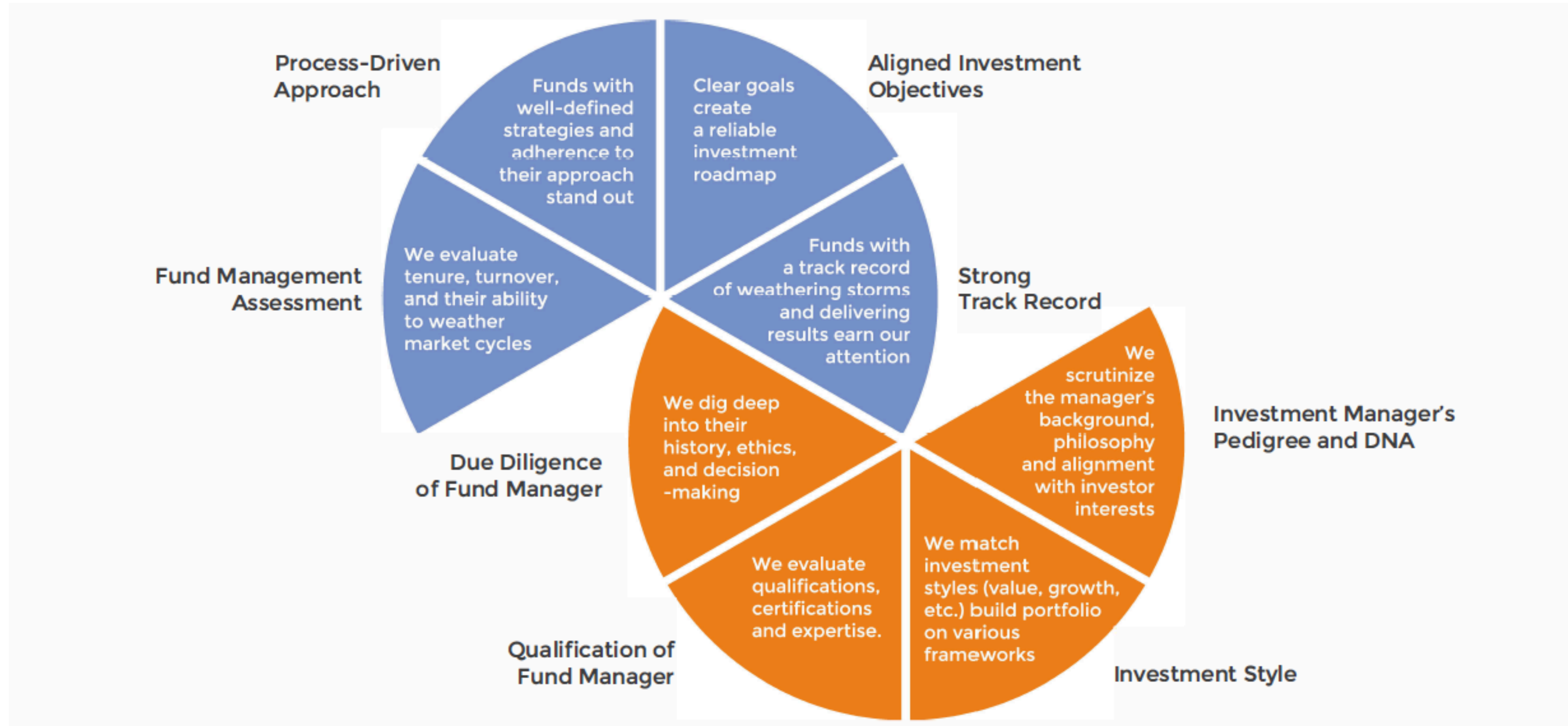
Why we stand as the exclusive choice?

The panorama of benefits beyond returns



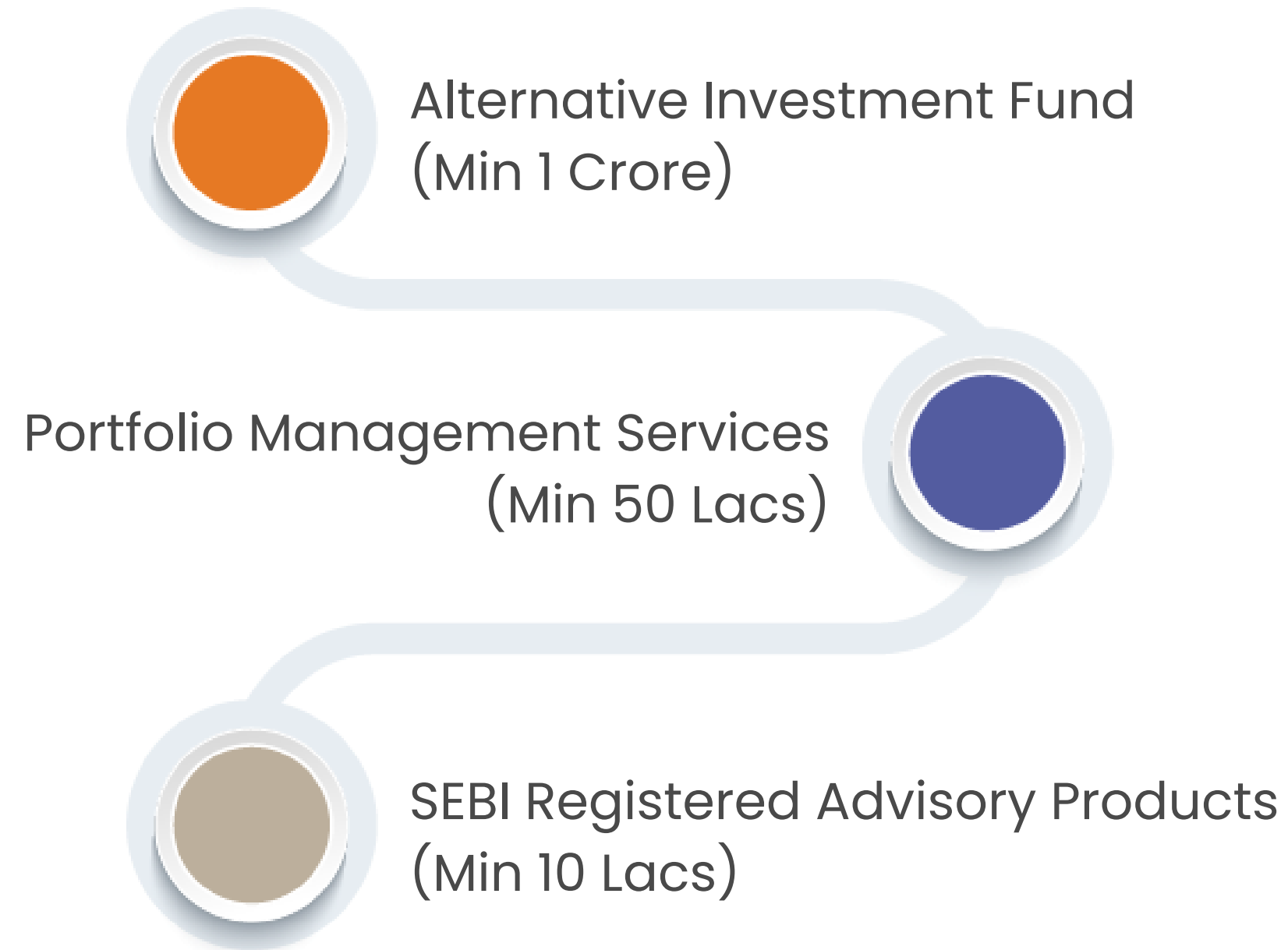
Strategic fund selection for portfolio optimization

Finding the right match for your financial goals

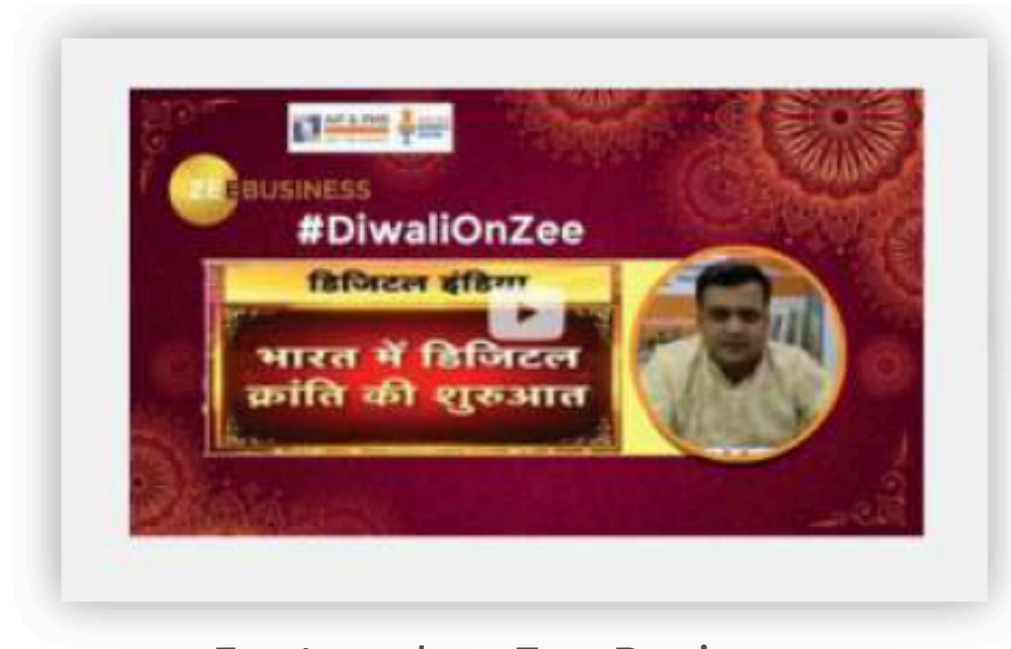


Diverse investment avenues tailored for you

Divided by category, united by our investing process



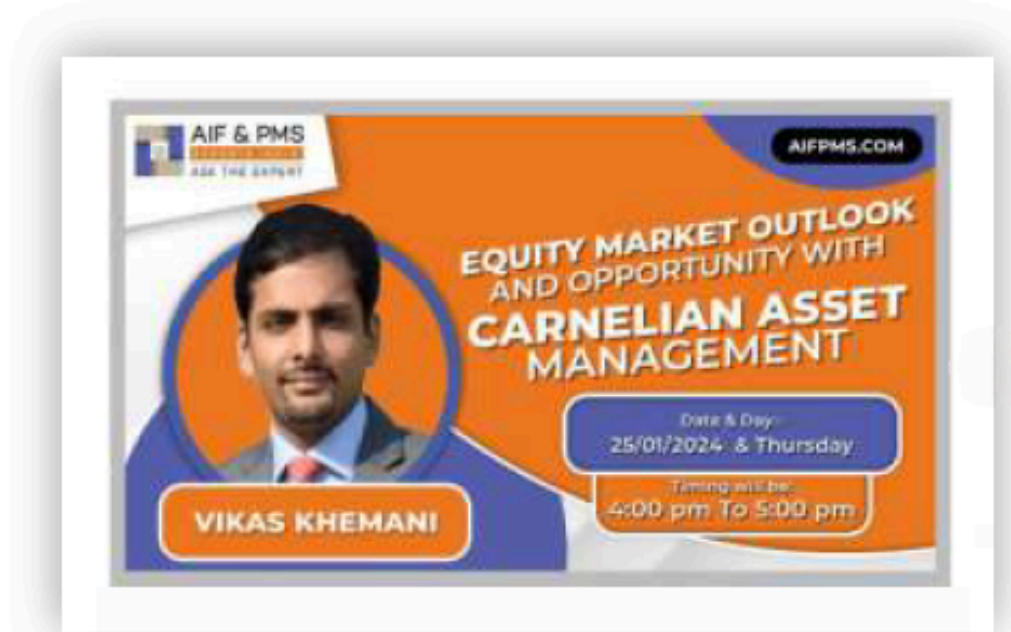
Media Interactions



Featured on Zee Business

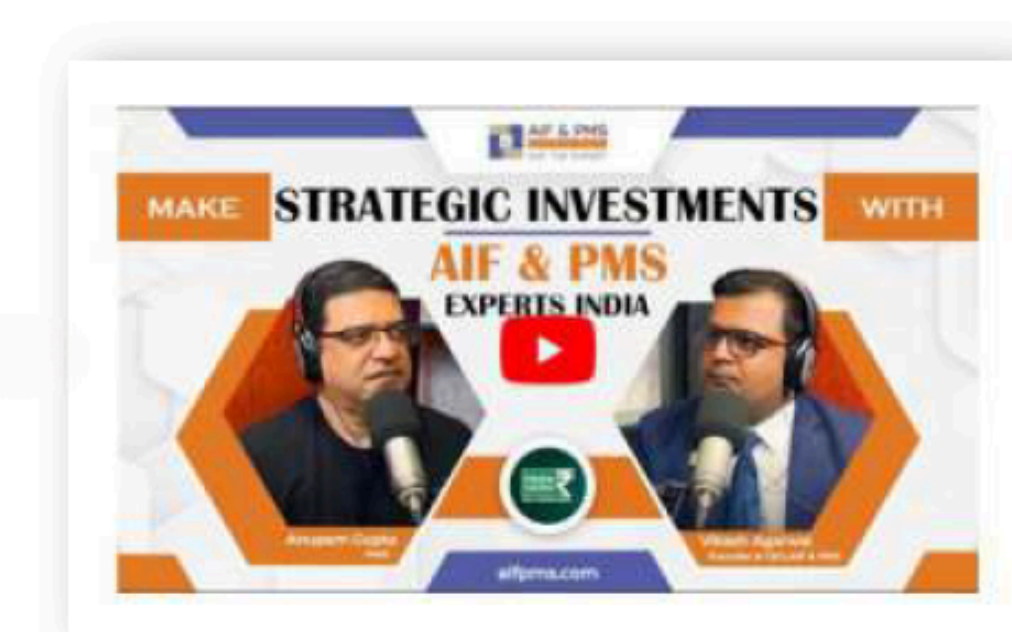


Featured on Zee Business



Equity Market Outlook And Opportunity

Featured on
YouTube



Make Strategic Investments

Process-driven returns

A proven process for consistency



Process-driven wealth creation

We meticulously follow our investing process

Investment Style

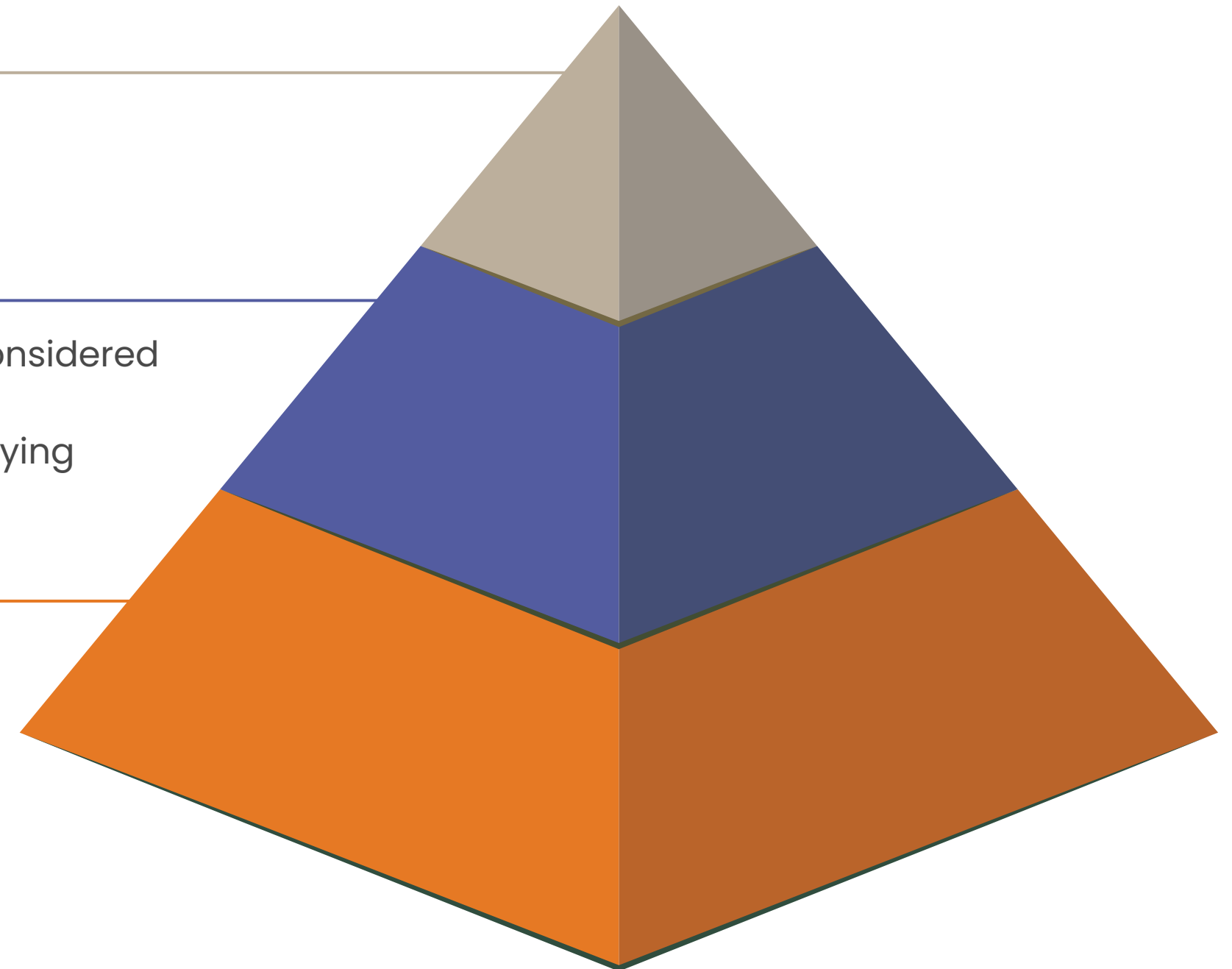
Clear, adaptable strategies aligned with investor goals, crucial for navigating market fluctuations and capitalizing on opportunities.

Investment Quality

Focusing on the intrinsic value and fundamentals of the assets being considered for investment. Exploring the qualitative aspects such as management competence, competitive advantage, and financial health of the underlying companies or assets.

Investment Performance

Emphasizing consistent, risk-adjusted returns and effective draw down management to achieve long-term growth while preserving capital.



The imperative of an investing process

A compass for systematic wealth creation

Guidance Amidst Uncertainty

An investment process acts as your compass especially during uncertain times.

Avoiding Emotional Pitfalls

A well-defined process helps you stay rational, preventing knee-jerk reactions based on fear or greed.

Consistency in Decision-Making

An investment process ensures you make informed choices consistently, regardless of market noise.

Customization to Your Goals

An investment process tailors strategies to your unique financial objectives, whether it's retirement, or wealth accumulation.

Risk Management

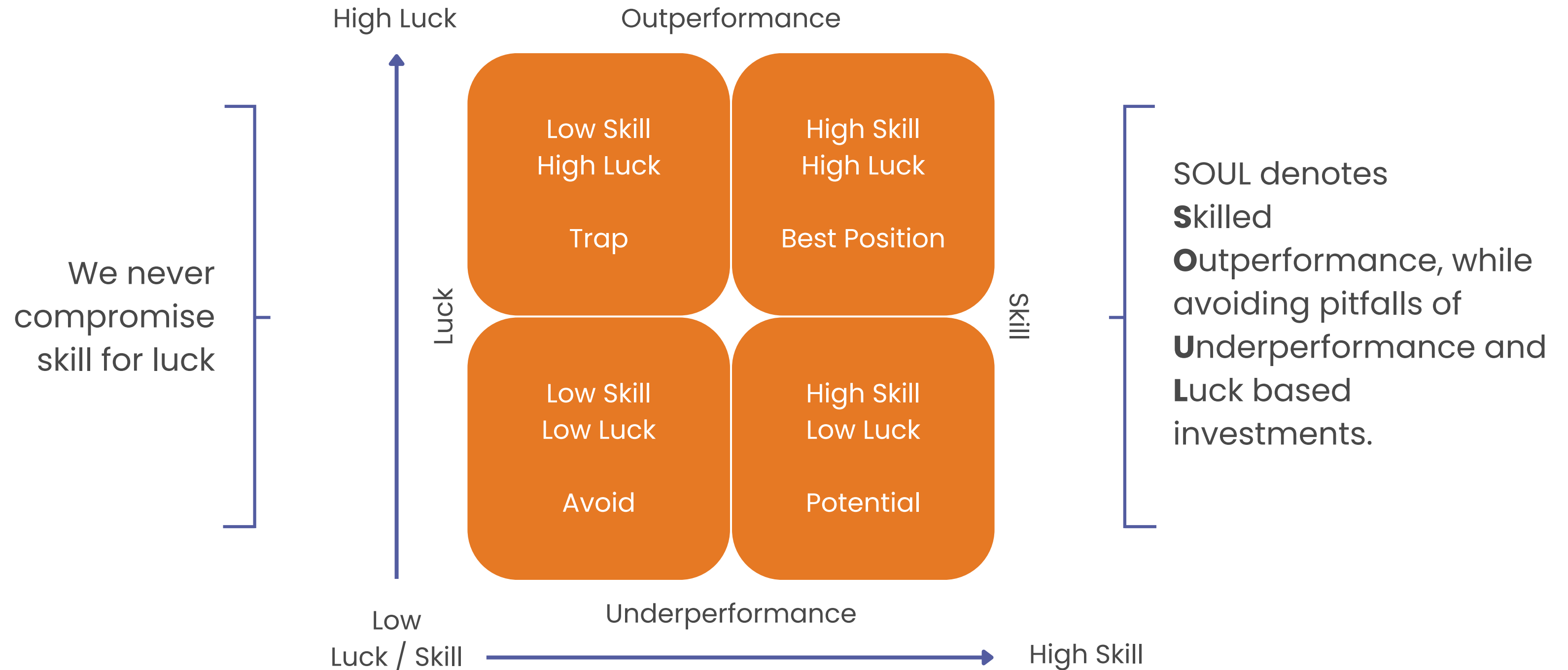
Like a safety net, a process assesses and manages risks. It helps you strike a balance between growth and protection.

Long-Term Perspective

An investment process ensures you make informed choices consistently, regardless of market noise.



The soul of our fund selection philosophy is SOUL



Skill and luck jointly shape alpha

We never compromise skill for luck

Luck

- Not always reliable
- Investments based solely on luck lack consistency and sustainability

Skilful Investments

- Provide better risk-adjusted returns historically
- Indicate promising future outcomes

Fund Selection Process

- Emphasizes funds with proven returns from robust investment processes by Portfolio Managers

Skill

- Key attribute for generating consistent alpha
- Drives successful investment outcomes



Analyzing Fund Allocation

- Considers the balance between luck and skill in our investors' fund allocations

Fund selection process

Our rigorous fund manager selection process ensures that you have the best fund managers In your portfolio



Validations of our unique investing process



Avinash Bhandari

Founder and Managing Partner
Think North Management Consultants

Testimonial from our investor

Before discovering AIF & PMS Experts India and meeting Vikas, I had consulted with numerous prominent wealth managers, yet none could tailor a portfolio to match my unique needs. Frustrated by the lack of suitable solutions from leading wealth management firms, I was skeptical about finding the right fit.

However, upon meeting Vikas, I was impressed by his meticulous approach. He took the time to thoroughly profile me from various angles, ensuring a deep understanding of my financial objectives. Utilizing his innovative investing process, 3I, Vikas crafted a personalized portfolio tailored to my specific requirements. Despite having to forego some trending funds that didn't align with his investing philosophy, Vikas's commitment to my long-term financial success was evident from the start.

5 years later, I am still with AIF & PMS Experts India, entrusting them with my entire investment portfolio. Vikas and his team have consistently demonstrated their unwavering support, guiding me through both prosperous and challenging times. Thanks to their expertise and dedication, I have been able to stay focused on my financial goals, tuning out the distractions of short-term market fluctuations. My journey with AIF & PMS Experts India has been nothing short of transformative, and I am grateful for their continued partnership.

Validations of our unique investing process



Bipinchandra Dugam

Senior Drilling & Completions Manager

Testimonial from our investor

I used to distribute my investments among various wealth managers, resulting in a fragmented and challenging tracking process. The frequent turnover of relationship managers (RMs) added to the instability, while unwanted fund sales and excessive portfolio churn led to subpar performance. Poor client service further eroded my confidence, leaving me feeling adrift and unsupported in my financial journey.

However, upon meeting Vikas, my investment experience underwent a remarkable transformation. He not only guided me through the process of portfolio construction but has continued to provide unwavering support ever since. Consolidating my investments under his stewardship, Vikas ensured a stable relationship by retaining my RM, fostering a bond that transcended mere investment transactions.

AIF & PMS Experts demonstrated a commitment to my financial well-being by conducting periodic portfolio reviews and making adjustments only when aligned with my goals and their investing process, 3I. This approach eliminated the need for frequent churn, resulting in improved portfolio performance.

Over the past nine years, my journey with AIF & PMS Experts has been nothing short of delightful. I commend Vikas and his team for their dedication and wish them continued success.

Process-oriented portfolios

Unbiased and customized portfolios



Funds that undergo rigorous scrutiny

We only recommend funds aligned with our 31 criteria



Fund selection at our firm is more than a process; it's an art dedicated to maximizing returns and minimizing risks.

Our methodical approach integrates rigorous research, competitive analysis, and a forward-thinking investment philosophy.



We employ a comprehensive methodology, including thorough due diligence, quantitative and qualitative assessments, performance evaluations and continuous monitoring of fund managers and strategies.

Our commitment to excellence in fund selection is evident in our dedication to staying abreast of market trends and adapting strategies accordingly.



Each fund undergoes meticulous scrutiny to ensure alignment with clients' objectives and our high performance standards.

We optimize investment outcomes by combining empirical data with astute judgment, resulting in a robust and dynamic fund selection process.



Awards and recognitions

Our commitment to excellence has been honoured with prestigious awards and accolades.



Our trusted investment partners

Curated through our rigorous Investing process



UNIFI CAPITAL



AXIS ASSET MANAGEMENT



WHITEOAK
CAPITAL MANAGEMENT
THE ART AND SCIENCE OF INVESTING



VALUEQUEST



Abakkus
Believe in the Basics



ABANS
INVESTMENT MANAGERS



SUNDARAM
ALTERNATES
UNEARTHING OPPORTUNITIES



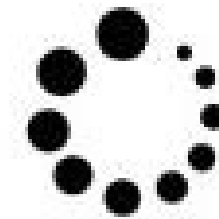
GREEN
LANTERN
CAPITAL
LLP



ASK
Investment
Managers



SageOne



Piper Serica



Alchemy
Asset Management



MARCELLUS



vivriti
CAPITAL

Process-driven product selection

Curated through our rigorous investing process

AIF Products

Helios Long Short Fund

Motilal Oswal Real Estate

Pantomath

Piper Serica Angel Fund - Cat 1

Step Trade

Vivtri Private Equity

PMS Products

Abakkus Emerging Opportunity Fund

Carnelian Shift Strategy

Green Lantern Capital Alpha

ICICI Contra & Pipe

Motilal Oswal Mid To Mega

Nine Rivers Capital - Aurum Small Cap

Process-driven performance: AIF

Product Name	1yr (%)	3yr (%)	5yr (%)	Inception
Abakkus Emerging Opportunity Fund	58.70	34.80	NA	37.60
Helios Long Short Fund	37.99	NA	NA	20.95
Prudent Equity Ace Fund	100.35	NA	NA	74.53
ITI Long Short Equity Fund	27.34	48.11	97.87	14.67
Ace Lansdowne India Equity	30.50	16.70	NA	22.30

Data as on : 29/02/2024

Disc: Past returns may not guarantee future returns

Process-driven performance: PMS

Product Name	1yr (%)	3yr (%)	5yr (%)	Inception
Green Lantern - GL Alpha Fund	85.13	37.51	NA	41.08
ICICI Prudential PMS Contra Strategy	52.80	28.40	24.30	21.90
Carnelian Shift Strategy	71.70	40.20	NA	45.90
Abakkus Emerging Opp Approach	55.30	NA	NA	38.10
Motilal Oswal Mid To Mega Strategy	67.90	20.20	NA	27.90

Data as on : 29/02/2024

Disc: Past returns may not guarantee future returns

Integrated financial solutions

Solutions extending beyond investments



Family Office

We offer personalized financial management, ensuring the preservation and growth of your family's wealth for current and future generations.



Estate Planning

We work closely with you to create a comprehensive plan that safeguards your assets, minimizes tax implications, and ensures a smooth transition for your loved ones.



Trust Formation

We guide you through the intricacies of trust creation, providing a secure framework for wealth transfer while aligning with your values and aspirations.



Taxation Consultancy

Through our empaneled Chartered accountant, we devise tailored strategies for optimal tax management.

Process-oriented team

We live by our process



About the Founder



Vikas Agrawal | Founder & CEO

Vikas Agrawal is a Founder and CEO, holding an MBA in finance. With 20 years of experience advocating for AIF & PMS products in various reputed organizations, he emphasizes the importance of a systematic approach to creating portfolios for his investors and champions them within his investor community and among his colleagues. He has conducted interviews with the top 100 minds in equities in India, sharing their insights with his investors. Vikas frequently appears on Zee Business, ET Market, and ET Now channels to offer his perspectives on capital markets. Additionally, he has attended Berkshire Hathaway AGMs, where he had the opportunity to meet Warren Buffet and Charlie Munger in person. Vikas consistently shares his learnings from these experiences with his investors.

Solutions extending beyond investments

The guardians of our investing process



Devanshu Bindlish

VP - Advisory

Devanshu, as the founding member of AIF & PMS Experts, has spent the past six years honing a comprehensive financial acumen crucial for fostering and managing client relationships. His services not only retain our investors but also attract new ones.

Guiding your investments with expertise

The advocates of our investing process



Avadhoot Shinde

AVP – Research & Development



Chandan Sinha

AVP – Research & Development



Sinoo Biswas

AVP – Advisory



Mukund Walunj

Sr. Manager – Research & Development



Let's embark on a journey to create wealth
We live by our process!

 AIF & PMS Experts India

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