



Nurture your wealth to help it grow with our

PORTFOLIO PLUS

BEST DOMESTIC PRIVATE BANK
ASIAMONEY POLLS 2009, 2010 & 2011

ANANDRATHI

PORTFOLIO PLUS

Anand Rathi is a leading full service investment bank founded in 1994 offering the entire gamut of financial services and wealth management solutions to institutions, corporations, high-net worth individuals and families.

GROUP PHILOSOPHY

The firm's philosophy is entirely client centric, with a clear focus on providing long term value addition to clients, while maintaining the highest standards of excellence, ethics and professionalism.

The entire firm's activities are divided across distinct client groups: Individuals, Private Clients, Corporates and Institutions.

CREDENTIALS

AnandRathi has been named 'The Best Domestic Private Bank' by Asiamoney Polls for three consecutive years -2009, 2010 & 2011. The firm has emerged a winner across all key segments in Asiamoney's largest survey of high net worth individuals in India.

OBJECTIVE

The key objective is to deliver consistent returns over the long term, from a portfolio of companies selected on the basis of well defined objectives and a good corporate track record.



CONSTRUCT

Return on Equity is a key criteria based on which the underlying gamut of companies are targeted. These companies are chosen from one of the most comprehensive basket of equity securities : BSE 500

The second important focus for selection is an optimum size of corporate operations and a good track record.

Consistency of key operating metrics is the final criteria based on which the companies would be eligible for the portfolio.

AnandRathi PMS FEATURES

- Minimum ticket size : Rs. 10 lacs
- 15-20 STOCKS, diversified across sectors
- Balance between large caps and mid sized companies
- Themes offered : Domestic plays & Asset Light companies
- Majority of the companies have adequate analyst coverage
- Majority of the stocks will be part of core portfolio
- Type of instruments : Equity & Equity Related Instruments, Fixed Income Instruments, Cash & Cash Equivalent
- Benchmark will be CNXMIDCAP

AnandRathi PMS BENEFITS

- Dedicated Web page which can give the portfolio snapshot
- A relationship manager to cater to investment needs
- Constant monitoring of the portfolio
- Customer service desk to address client queries

ANAND RATHI

Corporate Office: 11th Floor, Times Tower, Kamala City, Senapati Bapat Marg, Lower Parel, Mumbai - 13
Regd. Office: 4th floor, Silver Metropolis, Jai Coach Compound, opposite Bimbisar Nagar, Goregaon (E), Mumbai - 63
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PMS registered under Anand Rathi Financial Services Ltd. PMS registration number:- INP00000282.

Custodian – IL&FS Securities Services Ltd.

All investments are subject to market risk. Please read the risk factors before investing in the same.