

AAPNA TIME AAYEGA



Equity Advisory





AAPNA TIME AAYEGA EQUITY ADVISORY

INVESTMENT OBJECTIVE

The aim is to generate good returns that identifies high quality business that can stand test of time and create wealth over years to come. It comprises stocks that has fallen massively in the current market. We believe these losses are likely to be bounce back sharply once market recovers.

IS THIS MODEL PORTFOLIO FOR YOU?

This model portfolio is suitable for the experienced investors who are willing to take higher risk for higher returns. It is important to have a long-time horizon while investing in direct stocks because if there is a severe downturn in the market, an investor will need plenty of time to make up for the decline in value. The expected average rate of return from a value portfolio is 15-20% over time.

No of stocks – 10-15 stocks

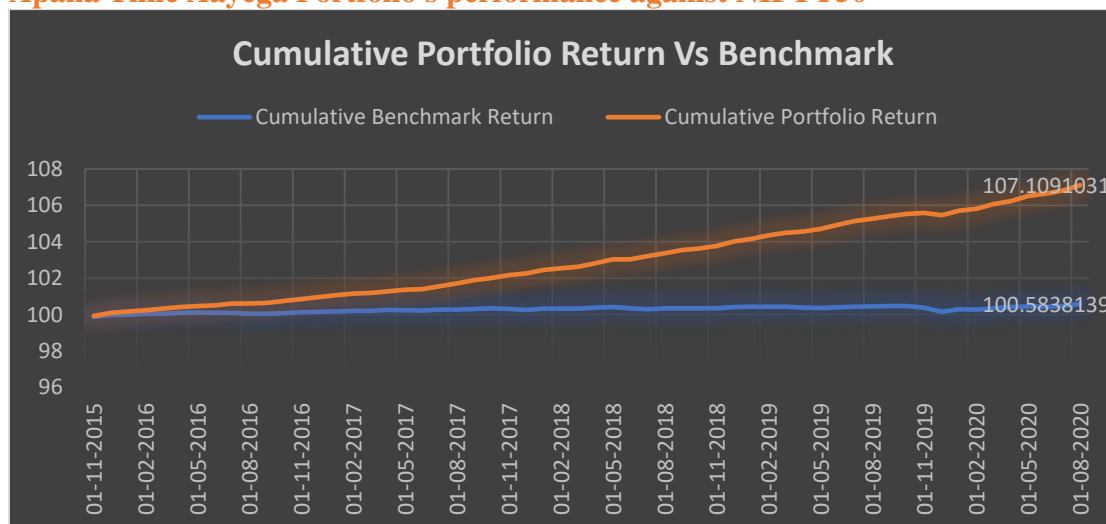
Stock portfolio - Minimum exposure of 5% and maximum 9-10% to avoid concentration risk.

Time horizon – Min 1 Year

Benchmark Index - Nifty 50

This chart shows the portfolio's cumulative monthly performance starting from Oct 2017 until the latest month end compared against NIFTY 50's cumulative returns as benchmark.

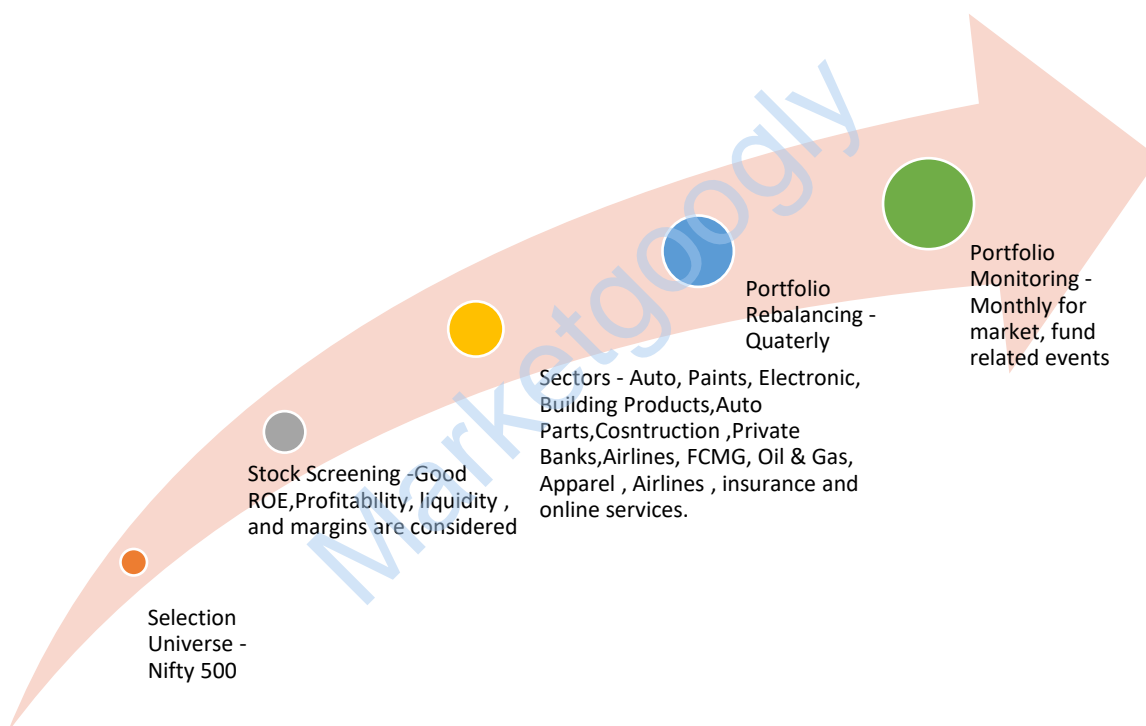
Apana Time Aayega Portfolio's performance against NIFTY50



STRATEGY

Buy and Hold investments with a time horizon of at least 1 year in stocks with moderately aggressive risk and consistent performance.

METHODOLOGY



STOCK SCREENING APPROACH

For portfolio construction, this Model Portfolio consists of stocks having solid fundamentals with positive financial trend from Nifty 500. These parameters include Return on Equity, profitability ratios, liquidity ratios and trendline analysis of some of these parameters. Some of the screening criteria used for the portfolios are that the Return on Equity ratio should be high, good margins, Good Return on Investment as compared to peers in the same sector. The stocks selected belong to different sectors/industries ensuring good diversification and liquidity.

Sectors

We have stocks across sector to ensure good diversification and liquidity.

Portfolio Rebalancing

Portfolio is rebalanced once in a quarter to bring back the sectoral allocation at desired level and for an in-depth stock level check.

Portfolio Monitoring

Model Portfolios are monitored on a monthly basis to assess any exit/entry required based on market events, significant sector level changes, any company specific announcement, analyst reports or any corporate governance issue.

Investor Profile

1. A medium risk taker 31 – 50 years old investor with dependents and high savings rate and a fair allocation already done to mutual funds for meeting their retirement goals.
2. A High-risk taker above 50 years old investor has retired and looking for healthy returns with good risk return trade off.

Important Dates

Market Cap Category – Multicap

Last Rebalancing on – Sep 22, 2020

Next Rebalancing on –Dec 22, 2020



Disclaimer: The information on this site is provided for reference purposes only and should not be misconstrued as investment advice. Under no circumstances does this information represent a recommendation to buy or sell stocks. All these portfolios are created based on our expert's experience in the market. These Model Portfolio are prepared by SEBI Registered RIA.