WEALTH MANTRA

Mutual Fund Portfolio

Marketgoogly
New way to look at your finanace

VERY AGGRESIVE MODEL PORTFOLIO - SUMMARY

INVESTMENT OBJECTIVE

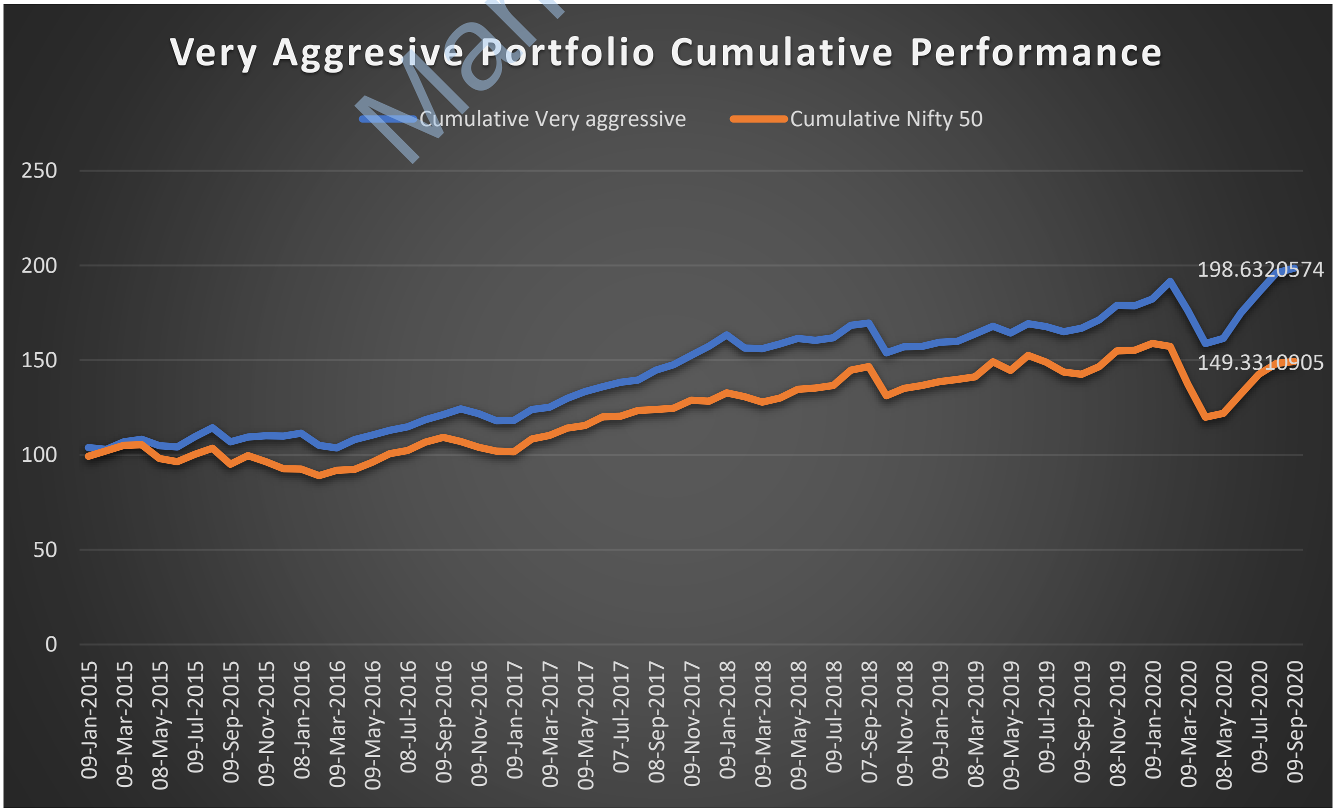
The aim is to generate healthy returns with reduced downside risk. We have used good hedging mechanism by creating Multicap and multi asset growth portfolio.

IS THIS PORTFOLIO SUITABLE FOR YOU?

This Wealth Mantra portfolio is appropriate for an investor whose are looking to achieve various financial goals with regular investments with high risk tolerance for a longer time horizon.

Also, investors who are willing to accept periods of high market volatility in exchange for the possibility of receiving returns that outpace inflation. Hence, we allocate asset across asset class like Debt, Equity, Hybrid, Liquid and others to create a well-diversified portfolio to meet your financial goals. We suggest strategic allocation of 90% in Equity, 5% in Debt and 5% in liquid fund category revised based on current market scenario.

Benchmark – **Nifty 50 TRI** and Rebalancing – **Quarterly**



MARKETGOOGLY - MUTUAL FUND PORTFOLIO

There is no investment box without mutual funds. You can build your entire portfolio by just buying a few mutual funds across and within asset classes to achieve all your short and long-term goals and objectives. Our experts crunch millions of data points to advise you best performing funds and build a well-rounded direct mutual fund portfolio to fulfill your dreams.

With Marketgoogly Wealth Mantra Mutual Fund Portfolio, we are trying to make investing simple. These Mutual Fund portfolio uses asset allocation strategy based on your risk profiling which form the base for our research-based products and other advisory services. We analyze the qualitative and quantitative factors observed based on our extensive research for suggesting portfolio for individuals' investors like you.

We value your hard-earned money and ensure you take good care of it. You can now invest in direct mutual recommendations and save on commissions you pay to regular fund distributors who take up to 1.5% from your investment amount and instead generate a higher return on your investments.

REFER APPENDIX FOR INDEPTH VIEW OF THE MODEL PORTOFLIO CONSTRUCTION AND PERFORMACE

WEALTH MANTRA PORTFOLIO

OBJECTIVE

The aim is to generate healthy returns with reduced downside risk. We have used good hedging mechanism by creating Multicap and multi-asset growth portfolio.

STARTEGY

This idea is for investors who are looking for long term investments to achieve their financial goals and seeking long term wealth generation.

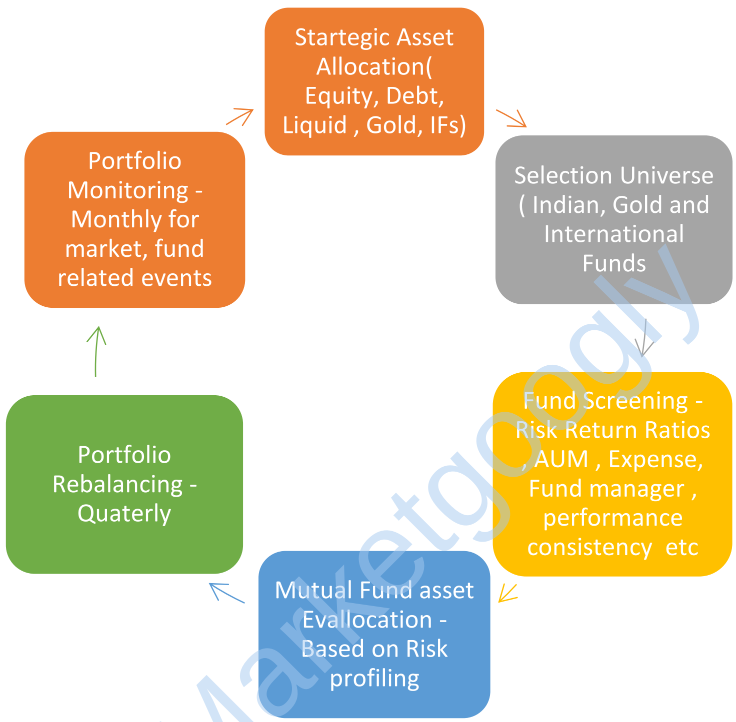
RATIONLE

The goal of Wealth manta plan is to guide you to achieve your financial goals like retirement, child education, child marriage, wealth creation, and others.

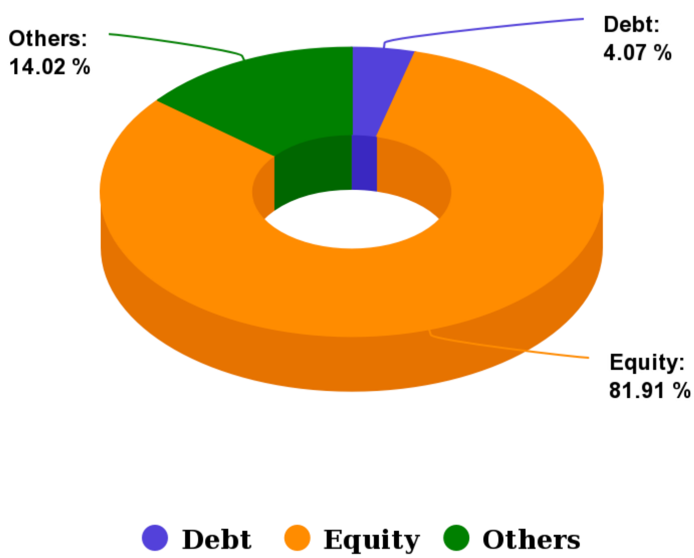
Hence, we allocate asset across asset class like Debt, Equity, Hybrid, Liquid and others to create a well-diversified portfolio to meet your financial goals.

To construct the very aggressive portfolio, we have considered Small Cap, midcap, Liquid, low duration and Multicap Equity Fund with exposure to global stocks. For meeting the investment objective of a growth oriented multi-cap, multi-asset portfolio and considering the long-term expected returns and risk levels of each asset class based on our long-term view of Indian economy & Global financial markets, we suggest strategic allocation of 90% in Equity, 5% in Debt and 5% in liquid fund category.

METHODOLOGY



ASSET ALLOCATION



TOP 10 PORTFOLIO HOLDINGS

Company Name	Sector	ISIN	Maturity Date	Coupon Rate	Aggregate Allocation (%)
Amazon Com Stk	Consumer Goods	US0231351067	--	--	3.92
CBLO(CCIL)	Current Assets		--	0.00	3.79
Triparty Repo	Current Assets		--	0.00	3.78
Mphasis Ltd.	IT	INE356A01018	--	--	3.49
Alphabet Inc Class C	Services	US02079K1079	--	--	3.39
HDFC Bank Ltd.	Financial Services	INE040A01034	--	--	3.12
Persistent Systems Ltd.	IT	INE262H01013	--	--	3.04
ITC Ltd.	Consumer Goods	INE154A01025	--	--	2.71
Bajaj Holdings & Investment Ltd.	Financial Services	INE118A01012	--	--	2.65
Facebook	IT	US30303M1027	--	--	2.44

KEY DATES:

1.Launch Date: March 10^{th}, 2019
2.Last Rebalanced: Sep 10th, 2020
3.Next Rebalancing Date: Dec 10^{th}, 2020

VERY AGGRESIVE PORTFOLIO PERFORMANCE

This chart shows the aggregate portfolio's performance for one year.

P2P Returns (%)

Disclaimer: The information provided is 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 or MF. All these portfolios are created based on our expert's experience in the market. These Model Portfolio are prepared and suggested by SEBI Registered RIA based on your risk profiling.