WEALTH CREATION

Mutual Fund Portfolio

Marketgoogly
New way to look at your finanace

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WEALTH CREATION MODEL PORTFOLIO - SUMMARY

INVESTMENT OBJECTIVE

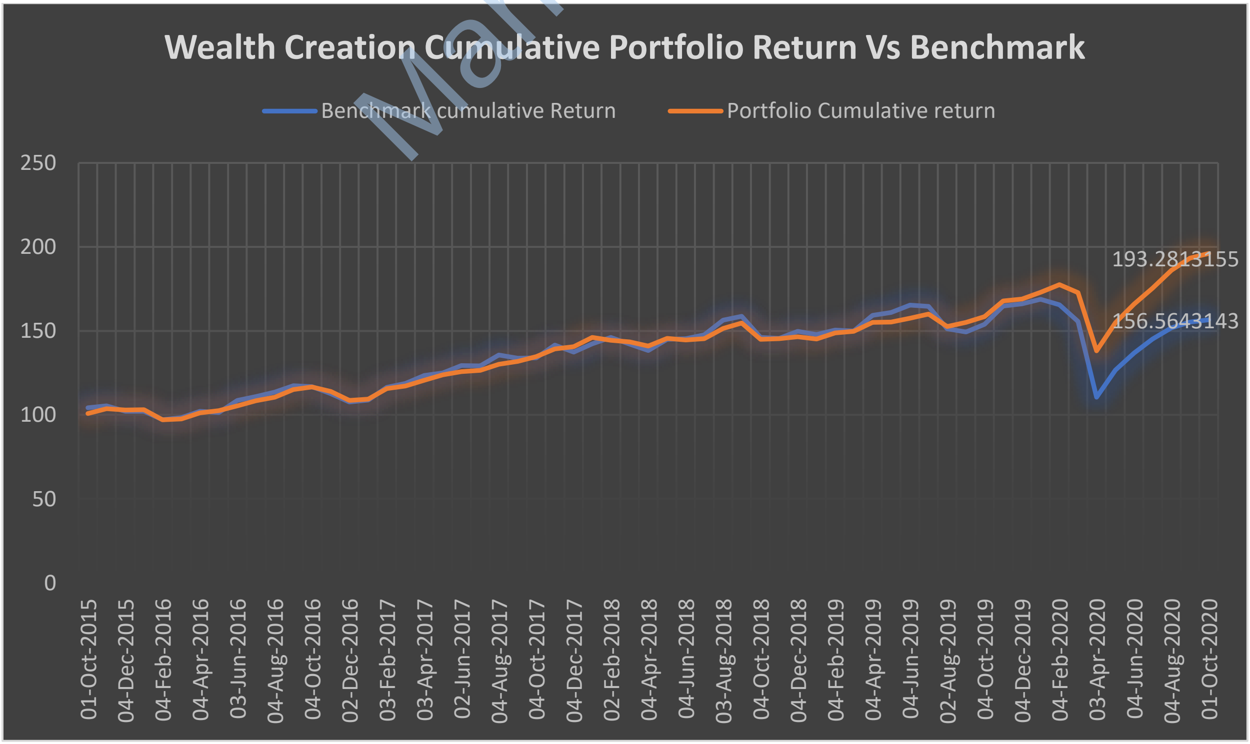
The aim is to generate healthy returns with reduced downside risk. We have used good hedging mechanism by creating Multicap and multi asset growth portfolio.

IS THIS PORTFOLIO SUITABLE FOR YOU?

This Wealth creation portfolio is appropriate for an investor who has already invested in major life goals or goals are on track with current monthly investments. Wealth Creation is for that extra savings which has capability to improve your lifestyle in future and give you cushion over major life goals.

Also, investors who are willing to accept periods of high market volatility in exchange for the possibility of receiving returns that outpace inflation. We suggest strategic allocation of 80 % in Equity, 10% in International Fund and 10% in gold 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 CREATION 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 seeking long term wealth generation. Buy and Hold for a time horizon for 8+ Years.

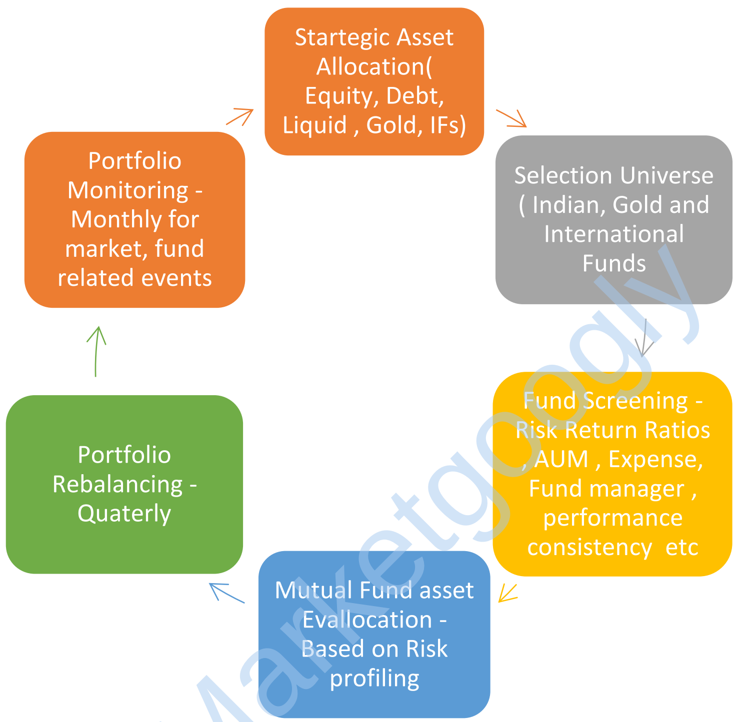
RATIONLE

This Wealth creation portfolio is appropriate for an investor who has already invested in major life goals or goals are on track with current monthly investments. Wealth Creation is for that extra savings which has capability to improve your lifestyle in future and give you cushion over major life goals.

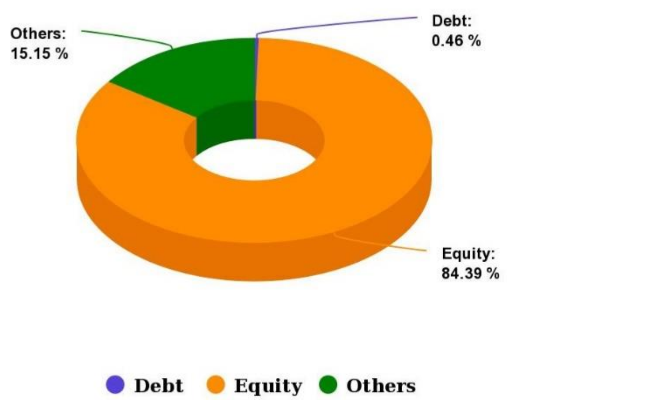
Also, investors who are willing to accept periods of high market volatility in exchange for the possibility of receiving returns that outpace inflation. Considering you are already invested in major life goals; we have not allocated anything to debt. To hedge your equity risk, we have taken allocation to gold and international equity to create a well-diversified portfolio.

To construct the portfolio, we have considered Large Cap, Small Cap, Midcap, Liquid, and 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 80% in Equity, 10% in International Fund and 10% in gold fund category.

METHODOLOGY



ASSET ALLOCATION



Appendix

TOP 10 PORTFOLIO HOLDINGS

Company Name	Sector	ISIN	Maturity Date	Coupon Rate	Aggregate Allocation (%)
Kotak Mahindra Mutual Fund	Mutual Funds	INF373I01049	--	0.00	9.84
International Fund	Mutual Funds	IE00BYV6MS67	--	0.00	8.97
HDFC Bank Ltd.	Financial Services	INE040A01034	--	--	3.59
Triparty Repo	Current Assets		--	0.00	3.06
ICICI Bank Ltd.	Financial Services	INE090A01021	--	--	2.82
ITC Ltd.	Consumer Goods	INE154A01025	--	--	2.49
Amazon Com Stk	Consumer Goods	US0231351067	--	--	2.13
Reliance Industries Ltd.	OIL & GAS	INE002A01018	--	--	2.07
Infosys Ltd.	IT	INE009A01021	--	--	1.99
Alphabet Inc Class C	Services	US02079K1079	--	--	1.77

KEY DATES:

1.Launch Date: March 10th, 2019
2.Last Rebalanced: Oct 05, 2020
3.Next Rebalancing Date: Jan 4, 2021

WEALTH CREATION 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.