

MERA PLAN



Equity Advisory





MERA PLAN 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.

IS THIS PORTFOLIO FOR YOU?

This customized portfolio is suitable for the all kind of investors who are willing to take risk as per their risk profiling. 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.

No of stocks – 10-15 stocks

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

Time horizon – Min 3-5 Year

Benchmark Index – Nifty 500

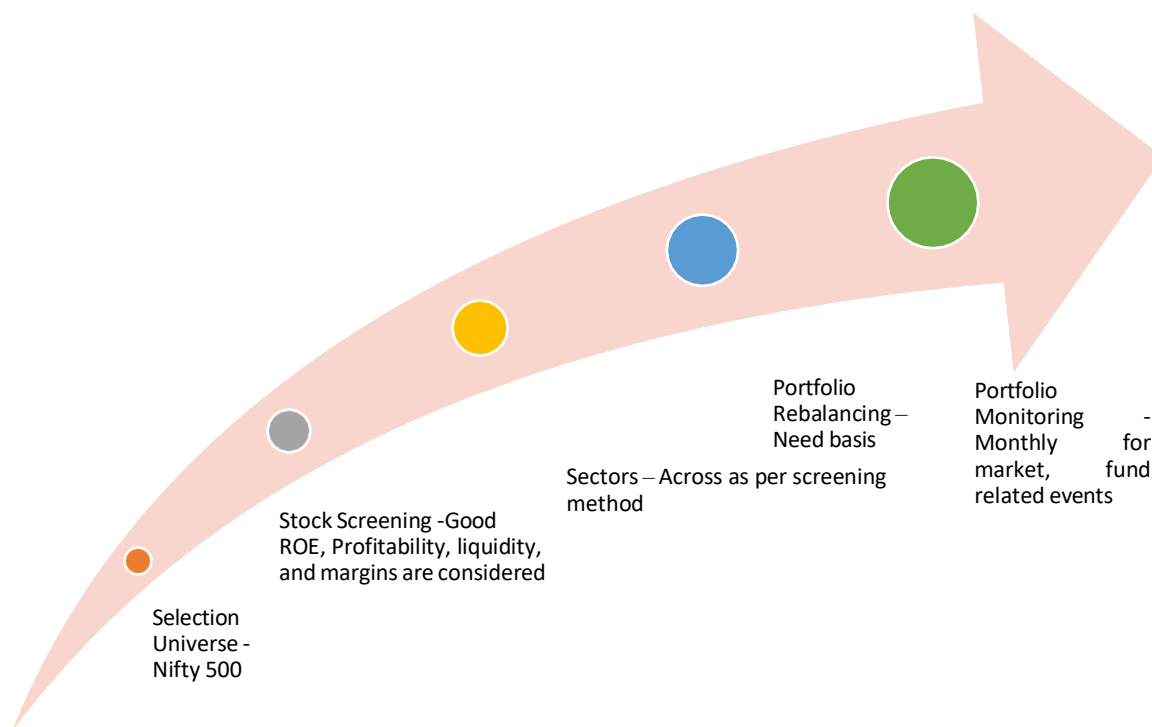
STRATEGY

Buy and Hold investments with a time horizon of at least 3-5 year in stocks.

Sectors

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

METHODOLOGY



STOCK SCREENING APPROACH

For portfolio construction, this 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.

Portfolio Rebalancing

Portfolio is rebalanced on need basis to bring back the sectoral allocation at desired level and for an in-depth stock level check.

Portfolio Monitoring

Portfolios are monitored monthly 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 low-risk taker 26-30 years old investor looking to invest long term to create wealth.
2. 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.
3. 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
Rebalancing on – Need basis



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 Portfolio are prepared by SEBI Registered RIA.