

Wealth Compounder

Factsheet As of 31st Dec. 2024

• Overview

Growing wealth by investing in natural earnings compounders that deliver above-average returns.

• Rationale

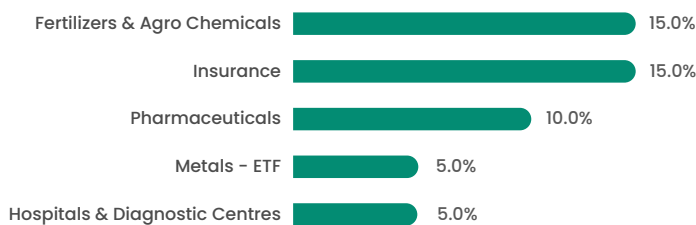
With a large and youthful population that shares global consumption aspirations, emerging sectors poised to benefit from these demographic shifts and demand for high-quality products and services will grow significantly faster than traditional industries. The leaders in these sectors, by establishing strong competitive moats, will experience rapid growth and generate greater value for their shareholders.

Min Investment	: INR 2,00,000
Fees	: 2.5% of Avg. AUM Per Year, Paid Monthly
SIP Option	: Available after min. investment of INR 2,00,000.
Min SIP	: INR 50,000

• Top 5 Stocks

Security	Sector
Sharda Cropchem Ltd.	Fertilizers & Agro Chemicals
Star Health and Allied Insurance Company Ltd.	Insurance
ICICI Prudential Nifty Metal ETF	Metals - ETF
Windlas Biotech Ltd.	Pharmaceuticals
Apollo Hospitals Enterprise Ltd.	Hospitals & Diagnostic Centres

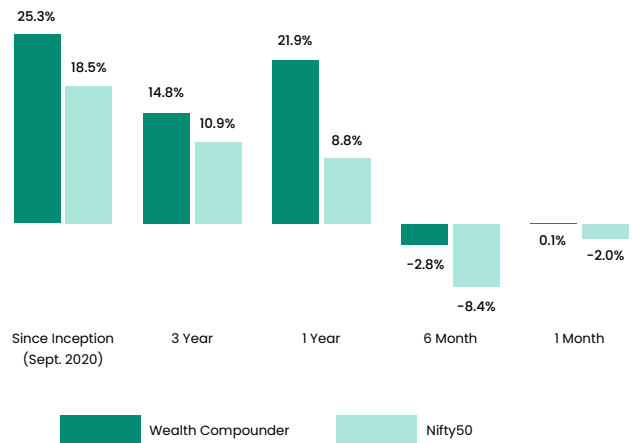
• Sector Breakup



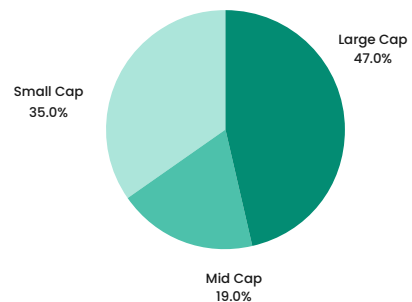
• Defining the universe

Identify fast-growing sectors that are benefiting from shifting demographic trends and evolving consumption patterns. Invest in the leaders within these sectors that can compound earnings over an extended period with minimal business volatility.

• Strategy vs Benchmark



• Market Cap Breakup



• Riskometer

