

PhillipCapital
Your Partner In Finance

CELEBRATING
50
YEARS
OF
MARKET

25
YEARS IN INDIA

Investment Advisory



Products: Salient features

	OASIS	NAUTICAL	COSMOS	RATNATRAYA
Investment Philosophy	<ul style="list-style-type: none"> Portfolio as per investor risk tolerance Curated portfolio with a mix of diversified stocks Different weights 			Growth oriented companies utilizing scuttlebutt approach
Allocation	Large Cap	Mid & Small Cap	Flexi Cap	Customized
Number of Stocks	9 to 15	15 to 25	18 to 25	Cherry Picked 10 to 25 stocks
Holding period	Medium to long term			Medium to Long term

Our Process

As per advisory product specified by investor

Investment
Advisory
Portfolio



OASIS, NAUTICAL & COSMOS

Investment Advisory

Objective & Features: To advice in a portfolio of 9 to 15 companies which can help generate alpha with focus on long term capital appreciation. This is a carefully crafted portfolio with companies having higher Market Capitalization, generally helps in relatively stable wealth creation and may payout steady dividends.

Allocation: Large Cap oriented portfolio

Benchmark: Nifty 100

Plan: Lumpsum | Lumpsum with SEP | STP

Acceptable Instruments: Liquid Assets, Portfolio of Stocks

Investment Horizon: Minimum 3 years

Dedicated Demat
Account

Monthly Report

Advisory Fees &
charges as applicable





Objective & Features: To advise in a portfolio of 15 to 25 nimble, business focused companies to investors with a higher investment horizon. Swings shall be an integral part of the investing journey. The stocks are advised for alpha boost in companies which stick to their core competencies and are better managed in different business cycles.

Allocation: Mid & Small Cap oriented portfolio

Benchmark: Nifty MidSmall 400

Plan: Lumpsum | Lumpsum with SEP | STP

Acceptable Instruments: Liquid Assets, Portfolio of Stocks

Investment Horizon: Minimum 3 to 5 years

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Objective & Features: To advise in a portfolio of 18 to 25 companies which can help generate alpha with focus on long term capital appreciation. A carefully crafted portfolio with companies from Large Cap, Mid Cap and Small Cap universe henceforth enabling stability along with growth potential

Allocation: Flexi Cap

Benchmark: Nifty 500

Plan: Lumpsum | Lumpsum with SEP | STP

Acceptable Instruments: Liquid Assets, Portfolio of Stocks

Investment Horizon: Minimum 3 years

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Mix & Match approach



Quoted for illustration only and are not recommendatory.

Stock Selection

Cleaner
Balance
Sheet



MANAGEMENT QUALITY & GOALS
Optimistic but Realistic

COMPETITIVE EDGE
Moat

EARNINGS & REVENUE
Growth trajectory

SUSTAINABLE GROWTH
Preferably without new debt

Why OASIS, NAUTICAL & COSMOS

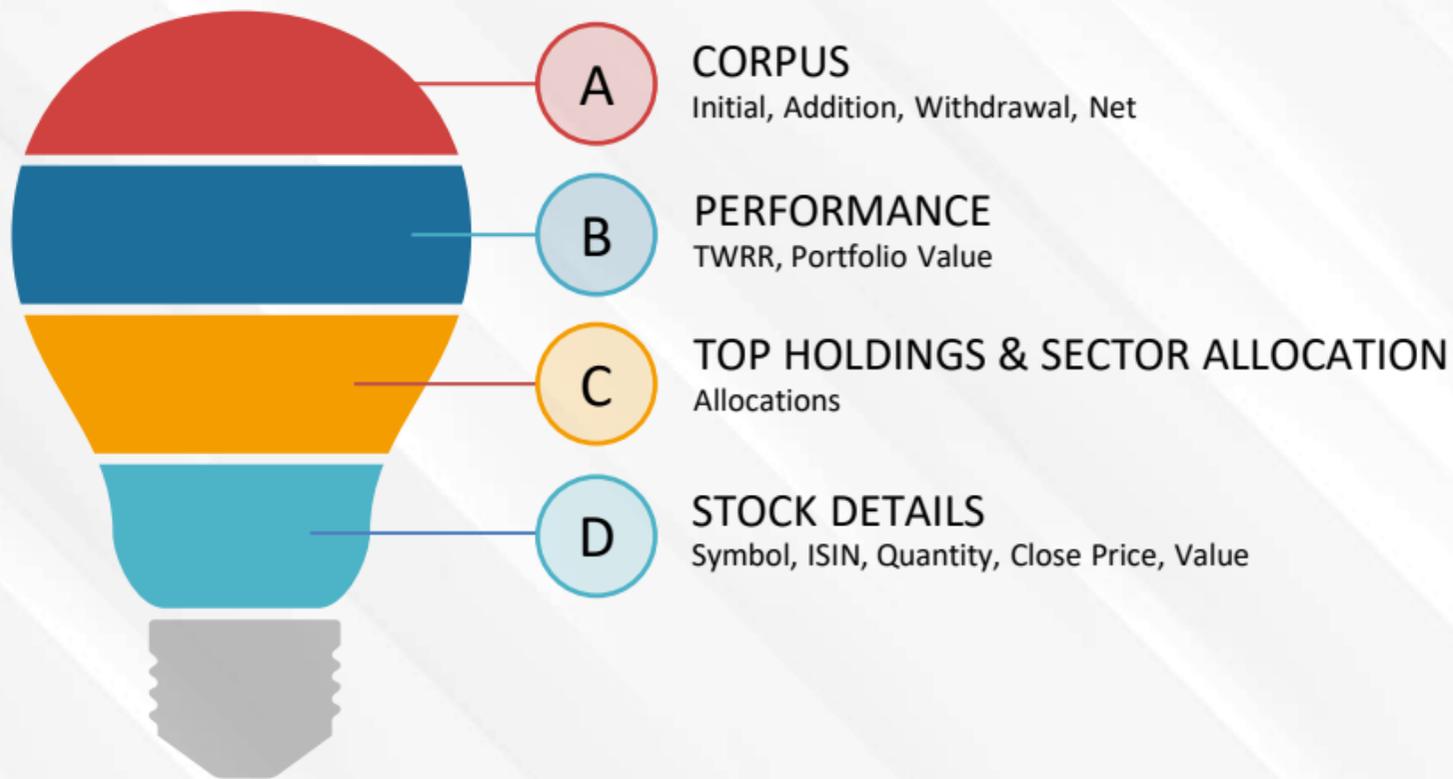
**WELL CRAFTED
PORTFOLIOS**

**FLEXIBILITY TO
CHOOSE**

**EASE OF
INVESTMENT**

**RISK
MANAGEMENT
FRAMEWORK**

Month End Report – OASIS, NAUTICAL & COSMOS





OASIS, NAUTICAL & COSMOS Investment Advisory

- Portfolio along with weights
- Focused portfolio where liquid component may vary
- Structured Advisory
- Philosophy is to stay invested for medium to long term



Risk Factors

- Equity Market Risk
- Execution Risk
- Exchange / Clearing Corporation / Depository
- Default risk Other risks (Black Swan event)



Get Started



PhillipCapital Investment Advisory

- Risk Profiling Questionnaire: Account is accepted with score > 12
- Initial Corpus: Minimum Capital of Rs 10 Lakh – Cash or Stock
- Account Opening process

MODE OF PAYMENT

By Fund transfer / Cheque

ACCOUNT ACTIVATION

3 to 4 business working days

OPERATIONS

Equity or units to be held in a DP account opened in investor name

REPORTING

Monthly Performance Report, Transaction, Holding & Corporate Action Report

PhillipCapital (India) Pvt Ltd (Registration- Non -individual)
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Principal Officer: Mr Mrinal K Passi
Email id – iapo@phillipcapital.in
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Customer Care Contact: 022 – 24831848 / 1800 221 331

E-mail:

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- Compliance Officer/Client Grievances: customeraffairs@phillipcapital.in

SEBI Registration No: INA000004518 (Validity- Perpetual)

SEBI Regional/local office address:

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Disclaimer

Investment in securities market are subject to market risks. Read all the related documents carefully before investing. Registration granted by SEBI, membership of BASL (in case of IAs) and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors

Risk of loss in trading/investment can be substantial and even more than the amount / margin given by you. You should carefully consider whether trading/investment is appropriate for you in light of your experience, objectives, financial resources and other relevant circumstances. PhillipCapital and any of its employees, directors, associates, group entities, or affiliates shall not be liable for losses, if any, incurred by you.

You are further cautioned that trading/investments in financial markets are subject to market risks and are advised to seek independent third party trading/investment advice outside PhillipCapital/group/associates/affiliates/directors/employees before and during your trading/investment. There is no guarantee/assurance as to returns or profits or capital protection or appreciation. PhillipCapital and any of its employees, directors, associates, and/or employees, directors, associates of PhillipCapital's group entities or affiliates is not inducing you for trading/investing in the financial market(s). Trading/Investment decision is your sole responsibility. You must also read the Risk Disclosure Document and Do's and Don'ts before investing. Kindly note that past performance is not necessarily a guide to future performance.

For detailed Disclaimer, please visit our website: www.phillipcapital.in

Let's Begin



Thank You