

PhillipCapital  
Your Partner In Finance

CELEBRATING

50  
Years  
of  
Growth

25  
YEARS IN INDIA

# Investment Advisory



## Products: Salient features

	SPARKLE	IMPACT Flexi-Cap	OASIS	NAUTICAL	COSMOS	RATNATRAYA
Investment Philosophy	Dynamic Portfolio with 3 Plans: Constant, Flexi & Dynamic	Specially curated portfolio. Invest in ideas of today & trends of tomorrow	<ul style="list-style-type: none"> <li>Quasi Model Portfolio as per investor risk tolerance</li> <li>Curated portfolio with a mix of diversified stocks</li> <li>Different weights</li> </ul>			Growth oriented companies utilizing scuttlebutt approach
Allocation	Customize: Large, Mid & Small Cap	Perfect blend of Large, Mid & Small Cap	Large Cap	Mid & Small Cap	Flexi Cap	Customized
Number of Stocks	Investor can select, Advised = 20	15 to 20	9 to 15	15 to 25	18 to 25	Cherry Picked 10 to 25 stocks
Holding period	Medium term	Long term	Medium to long term			Medium to Long term

## Our Process

As per advisory product specified by investor

### Investment Advisory Portfolio



**RATNATRAYA**

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**Investment Advisory**

## Objective & Features

- Companies are identified as per the customized requirement of the investor
- Customized portfolio
- Suitable for Investors with medium to high risk tolerance
- Investment horizon: **minimum 3 years**
- Benchmark: Customized
- Cherry picked 15-25 stocks. Liquid component may vary
- Minimum Investment Amount: 1 Crores
- Plan: Lumpsum; Lumpsum with SEP; STP
- Acceptable Instruments: Liquid Assets or Portfolio of stocks
- Dedicated demat account
- Charges: Advisory Fees & other charges as applicable
- Monthly report

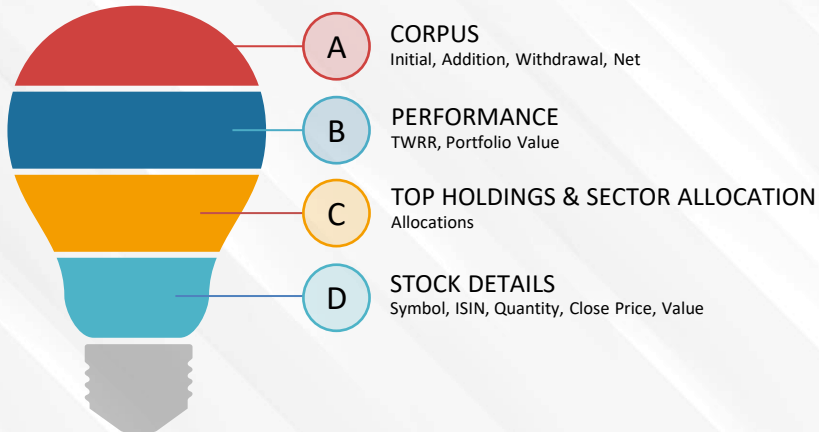


*Triple Gems: Quality of Business, Quality of Management & Valuations*





# Month End Report – RATNATRAYA







## RATNATRAYA Investment Advisory

- Fundamental & Scuttlebutt approach
- 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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For detailed Disclaimer, please visit our website: [www.phillipcapital.in](http://www.phillipcapital.in)

Let's Begin



*Thank You*