

PhillipCapital
Your Partner In Finance

50
YEARS
OF
EXCELLENCE

CELEBRATING

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



RATNATRAYA

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 10-25 stocks. Liquid component may vary
- Minimum Investment Amount: 5 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



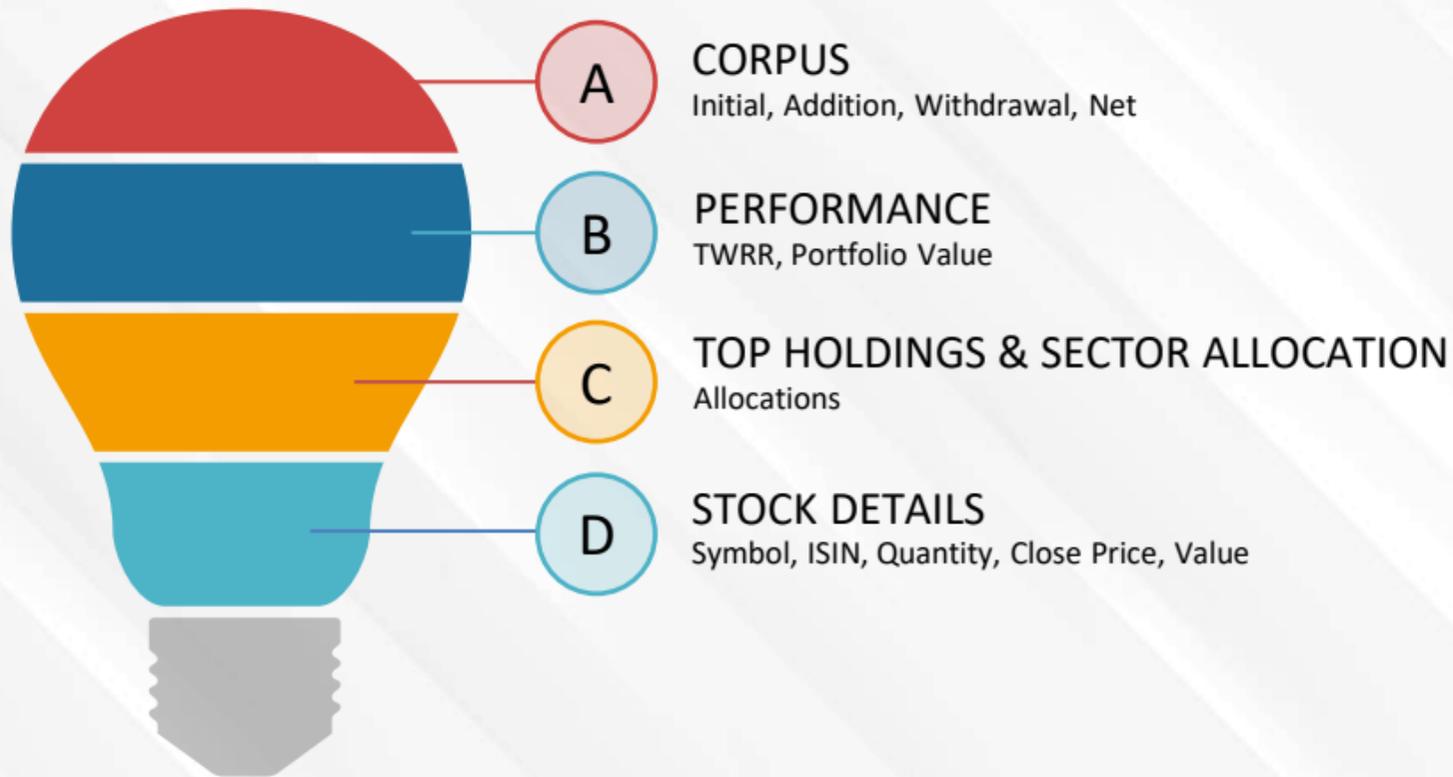
Stock Selection – RATNATRAYA

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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- 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